

Changes from 1998/99 to 1999/2000 FRS Datasets

Amendments to the derived variables in Release d of 1999-2000 FRS dataset:

- ININV (ADULT-Investment income). Interest from Individual Savings Accounts included.
- NININV (ADULT-Net Investment income). Interest from Individual Savings Accounts included.

New variables:

- SSPADJ/SMPADJ (ADULT) These calculate the amount of statutory sick pay and statutory maternity pay. Should be used in place of SMPAMT and SSPAMT (JOB table).
- SSPSPMPFG (JOB) Shows whether an adjustment made for SSP and SMP in UGRSPAY. Formated to output 0 = neither, 1 = SSP only, 2 = SMP only, 3 = Both.
- ISACTI/B/H (ADULT, BENUNIT, HOUSEHOLD) These are created for the new ISA accounts (ACCOUNT = 21). Flag up whether an adult has an ISA account.
- HDINDINC HDBUINC HDHHINC (ADULT, BENUNIT, HOUSEHOLD) Banded income variables for hot deck imputation.
- JOBHOURS (JOB) This gives total hours worked in each job. It also uses the individual components of hours instead of DVTOThr which is an incorrectly calculated base variable.
- ACTACCI/B/H (ADULT, BENUNIT, HOUSEHOLD) Shows whether an adult has a bank account that can be used for ACT.

Deleted variables:

- FSMHH, FSMLKHH, FWMLKHH (HOUSEHOLD) The free school meals, milk and welfare milk on a household level have been removed. The individual and benefit unit level versions exist with the benefit level variables being added in to the head of benefit units (UPERSON = 1) income.
- CHILD ACCOUNT Flags (CHILD) These have been deleted as children no longer asked account questions.
- CHINV (CHILD) As the child account records are no longer asked there is no way of calculating child income from investment.
- TOTCAPCH (CHILD) As child account variables have been deleted the total child savings variable has also been deleted
- DEDUCTS (ADULT) Deductions from pay excluding Income Tax, National Insurance Contributions and deductions for superannuation/pension schemes or AVCs. This variable has been removed. It can be calculated by summing DEDUC3 – DEDUC8 and DEDOTH.

- EQAHCBU/EQBHCBU (BENUNIT) Deleted because not relevant. Should use household level variables.
- GROSSPAY (ADULT) Deleted as used last pay and usual pay. Should use UGRSPAY for individual jobs or INEARNNS for adult income from employment.
- HHSTATUS (BENUNIT) Flags up which households have one benefit unit and in multi-benefit unit households which one is the first benefit unit. *NB this has been used in analysis in the past.*
- BUHDBEN (BENUNIT) HHHDBEN (HOUSEHOL) Flags up (for hot decking) whether any income related benefits are received by an individual in a BU or HH – no longer necessary. Note - HDBEN (individual flag) is still present on ADULT table
- TTWCOSTS (ADULT) and TTWMODE (ADULT) travel to work costs and mode of transport for travel to work. These deleted for V36 as questions not asked about them. (However, they are back in the questionnaire for 2000/01 (V37)).

Changes to current DVs:

Earnings related

- UGRSPAY (JOB - Gross weekly pay from a job) This was rewritten to be consistent with HBAI. This has been backdated to 1996-97. It also now includes the new SSP/SMP variables. Charity deductions is now DEDUC8 instead of CHRAMT
- INEARNNS (ADULT - Gross income from employment) This now sums all occurrences of UGRSPAY pay. This shouldn't change its output.
- NINEARNNS (ADULT - Net income from employment) uses SSPADJ/SMPADJ variables and only makes an adjustment when one is made to UGRSPAY using the new SSPSPMPFG (Adults with an SMP or SSP adjustment) variable.

Employment related

- TOTHOURS (ADULT - Total usual hours worked in all jobs). This now use the JOB level variable JOBHOURS.
- EMPSTATI (ADULT - Employment Status-ILO definition) Due to the variable WAIT (“whether waiting to take up job”) not being present (in error) for 1999-00, a small number of cases may not be rightfully classed as unemployed. There were 52 cases in the 1998/99 dataset out of 1419 classed as unemployed – 3.7% of this group. Without the variable WAIT, these cases are classified as OTHER.

Benefit related

- HBINDBU (BENUNIT - BU in receipt of HB CTB IS indicator) uses the WHOSESTB to assign CTB to correct benefit unit and not just to the 1st BU.
- INIRBEN/HDBEN (ADULT –IRB/IRB indicator) assign CTB to correct person (in line with changes to HBINDBU) and also include VAR2 = 4 (edited income based) for JSA cases

- INOTHBEN (ADULT - Other benefits) assign CTB to correct person using new WHOSECTB variable (in line with changes to HBINDBU).
- INRINC (ADULT - Remaining income) add in new benefits 81 (permanent health insurance) and 82 (any other sickness insurance).
- DEPDEDS (BENUNIT - Non-dependency Class) add in JSA(IB) (non-dependent deduction type).

Savings related

- TOTSABU (BENUNIT – Total savings of BU) This now includes the new category for TOTSAB = 2. This shouldn't effect the output.

Mortgage/housing related

- MORTINT (HOUSEHOLD -Mortgage interest) Reset MIRAS amount for each new household. This should mean a slight change for certain mortgage amounts.
- HSCOSTHH (HOUSEHOLD) Remove adjustments made for rent holidays for water rates as made already in earlier code. Should have the effect of increasing housing costs very slightly for a few cases.

Household/BU composition related

- FAMTYPBU (BENUNIT) Use ADULTB to calculate how many adults there are in a benefit unit.
- HHCOMP/HHCOMPS (HOUSEHOLD) Change how 2nd adult in household found.
- FAMTHBAI (BENUNIT) Uses Adultb instead of calculating number of adults in code.
- EMP/HOH, PENAGE/HOH, SICK/HOH (HOUSEHOLD) These variables are used to create publication totals. They now look at either the HoH or any other person.
- BUKIDS (BENUNIT) This now uses ADULTB and DEPCHLDB, no change to output
- DEPCHLDB/H ADULTB/H (BENUNIT/HOUSEHOLD) Uses first.sernum to be consistent with other DV code. No effect on output.

Care related

- CARE HOUR variables (ADULT) These now use the midpoints of bands as care questions now asked in bands and not as amounts. These are banded variables (eg 1 = 0-4 hr/wk, 7 = 100hrs+/wk, 8 = varies but under 20). Also includes new categories of carers.
- HOURCARE (ADULT) This now includes HOUR17-19 which are additional outside household care variables.

Other

- EQUIVAHC/EQUIVBHC (HOUSEHOL) These have been rewritten using variables from the benefit unit level. This was in order to correct how the second adult was accounted for (whether in 1st BU).

Other changes:

- Newly designed specs with access to code. More wordy and less like SAS code
- Some integer variables changed from integer type to categorical (this won't have any effect as they were in effect categorical in previous years).

Derived Variables on 1997-98 FRS

1. INTRODUCTION

This document outlines changes and additions in derived variables (DVs) for the 1997-98 release of the FRS. It is intended to highlight for users where existing DVs have changed and also to describe DVs that are new for 1997-98.

Users are asked to note where changes have occurred and also to agree on specifications for new DVs.

2. 1997-98 DERIVED VARIABLES

2.1 Background

The derived variables for the 1997-98 release are listed in the DV table located in **G:\public\frs\docs\1997_8\dvtable.xls**. Most of these were on 1996-97. Any new DVs or any that have changed have been marked accordingly in the final column of the table. The table also contains a brief description of each DV, a category showing the type of DV, the name of the specification used, its name on the flat-file (where appropriate), and who we believe to be the lead user of the DV. All DVs have been reviewed for the impact of changes in survey variables, harmonisation etc. For some DVs, certain constants need to be updated (such as interest rates). This involves updating the FRS constants spreadsheet in *DVMeta34.xls*.

2.2 New DVs

There are some new DVs for 1997-98.

Occupational Pensions

The 1996-97 DV OCCUPEN has been split up for 1997-98 due to user requirements. **EMPOCCP** shows the gross amount received from an employee pension paid by a person's former employer, **WIDOCCP** the gross amount received from a widow's employee pension paid by the former employer of the deceased spouse or relative, and **TOTOCCP** the total gross amount received from any occupational pensions. The specification for these DVs is held in **G:\public\frs\dvars\1997_8\occpen.v34**.

Adults and Children within a Benefit Unit

The new DVs, **ADULTB** and **DEPCHLDB**, count the number of adults and children within a particular benefit unit. This information was previously on the dataset, but in the form of base variables that no longer exist. The specifications are held in the directory above (adultb.v34/depchldb.v34).

Relationship to the Head of Household

The head of household is no longer necessarily person 1 within the household. The head is flagged by a value of 1 for the variable HOH on the adult table. The DV **RELHOH** shows the relationship of an individual to the head of household, and the specification is also held in the directory above (relhoh.v34).

Household Location

A DV has been created to flag whether or not a household is situated within London.

2.3 Changes to DVs

Hours Worked Variables

The questions relating to hours worked have been revamped for 1997-98, particularly those relating to over-time. Several DVs (those relating to employment status and hours worked) have been altered to accommodate these changes.

New Benefits

Some Benefits and Income DVs have been altered so that they include all changes to benefits. The main changes have been the introduction of Widow's Payment (lump sum) and Unemployment/Redundancy Insurance, and also the splitting up of both DSS direct payments and Social Fund Loan Repayments to allow the distinction between IS and JSA contributions/repayments.

Mortgage Interest

The DV **MORTINT** has been rewritten to remove separate information on Top-Up Loans, as this is now integrated into the general questions on mortgages.

Care

The care DVs have been rewritten to accommodate the changes to the information collected on this subject. Children are now asked all the same care questions as adults, so the previous childcare DVs have not been created. Instead, the care DVs on the ADULT table also now appear on the CHILD table. The DV HOURCARE, which records the number of hours of care received, has also changed accordingly.

Age Bands

All age band DVs have been harmonised with other Government publications as closely as possible.

2.4 DVs no longer created

The following DVs have not been created on the 1997-98 dataset because they are either:

- (a) No longer needed by us/users
- (b) Now base variables
- (c) Have not yet been updated
- (d) Have been replaced by new/other DVs; or
- (e) Information used for their derivation is no longer collected/has changed

AUTHTYPE (a)	GVTREGN (b)	STDREGN (b)
INCSE1 (d)	INCSEO1 (d)	NINCSEO1 (d)
INCSE2 (d)	INCSEO3 (d)	INSEINC3 (d)
SEINCAM1 (d)	NINSEIN1 (d)	OCCUPPEN (d) FOSTERBU
(e) DEP BAND (c)	CHCARE (e)	
CHHOUR (e)	DISTEN (a)	

2.5 Checking

Resources have not allowed comprehensive re-checking of every DV although a selection of the most important have been specifically examined for consistency with 1996-97 and are listed below:

Consistent with 1996-97

BOARDER	CWATAMTD	BURENT
EQAHCUBU	EQBHCBU	EQUIVAHC
EQUIVBHC	HHRENT	HSCOSTHH
MORTINT	NDDCTB	NDDISHC
NDDRENT	NININV	NINPENIN
TOTGNTCH	TOTGRANT	WATSEWRT
ININV	INDISBEN	INOTHBEN
INRINC	INCSEO2	NINCSEO2
EMPSTATB	EMPSTATC	EMPSTATI
FAMTHBAI	FAMTYPBU	FAMTYPE
HBINDBU	HBINDHH	TENTYPE
FSMBU	FSMHH	FSMLKBU
FSMLKHH	FSMLKVAL	FSMVAL

FWMLKBU
GROSSCT
NINEARNS
TOTHOORS

FWMLKHH
GROSSPAY
INDINC

FWMLKVAL
NINDINC
INDINC

Distributions for 1997-98 under investigation

TOTCAPBU

TOTCAPCH

Ed Pickering
ASD3E

28/04/2003
P:\FRS\SHARED\FRS34\DERIVED\LIST\DV PAPER.DOC
G:\PUBLIC\FRS\DOCS\1997_8\DV PAPER.DOC

Interviewer's Guide to Changes

Family Resources Survey: 1997 - 2000

April 1997

Introduction

In November 1996, following a public re-tendering exercise, the Department of Social Security officially awarded ONS and SCPR the new contract to conduct the FRS until the turn of the century. Both organisations are delighted to have won the contract again.

We would like to thank all the interviewers who have worked on the survey. Your proven experience and dedication were a principal feature in our bid for the new contract.

The new contract has resulted in a number of changes to the survey. This document describes the main changes to the questionnaire and the way it operates on the laptop from April 1997.

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PART 1:

The New Program Structure....

- **A single questionnaire: The household and benefit units are now integrated.**

The latest software (Blaise III) has enabled the household and benefit unit questionnaires to be joined together. No more time consuming exiting and re-entering into the separate questionnaires! Benefit unit number one automatically follows on at the end of the household questions, but if that isn't to your liking, there is a simple facility to quickly switch to one of the other benefit units. For ease of reference, 'Household' and 'Benefit Unit' schedules are still referred to and can still be thought of as separate questionnaires if you wish. The different schedules, the assets and admin blocks are known as 'parallel blocks'.

- **Ctrl & Enter = new menu**

When you press 'Ctrl + Enter' a new menu will be displayed. This will enable you to switch to admin, **or** switch to another Benefit unit, or back to the household schedule or to the assets block. This is a very quick process.

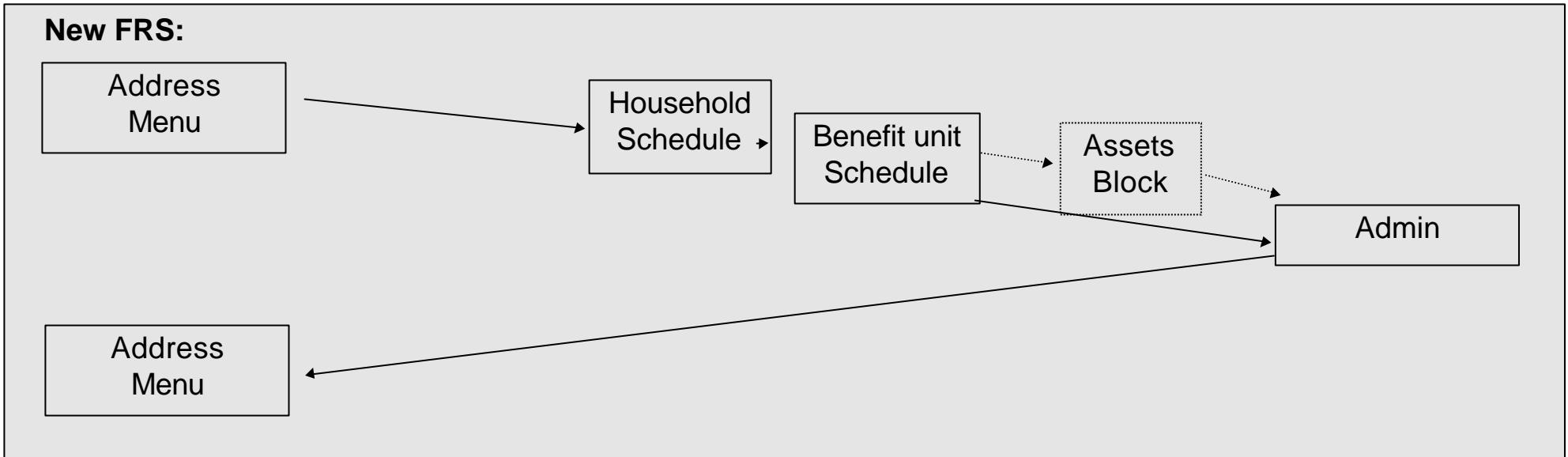
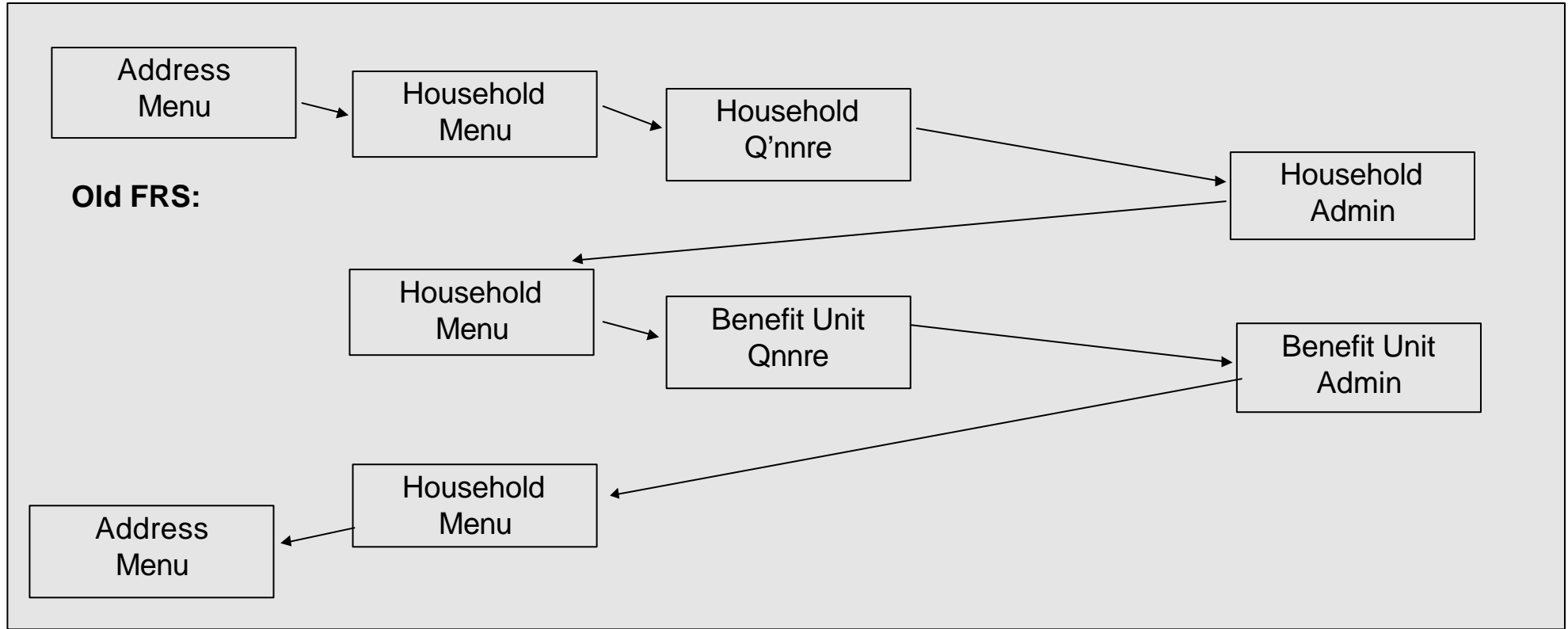
- **A single 'Assets block'**

You will now use Ctrl + Enter to switch to the assets questions as these are no longer found in the Benefit Unit. During testing, the new program was running very slowly and in order to improve the speed of the program, we have moved the questions so that they form a separate block. If a respondent is eligible for the assets questions you will be told at the end of the Benefit Unit to press 'Ctrl + Enter' and switch to the assets block. There is only one assets block per household; all people eligible to be asked about assets go to the same block.

- **A single admin block**

The separate BU admin block is obsolete. Each household now has just the one admin block. The coding of outcomes has been made simpler and fewer details about your calls to the address are required. There are some new questions which will help to create an admin block that is standard across CAPI surveys.

Main Features



PART 2:

New Features of the program....

- **New facilities**

In Blaise III, the screen on the laptop has a different appearance. Some of the shortcut keys (e.g ctrl + F4) have also changed. The main changes are shown below. SCPR interviewers will be given a new sticker for the computer, ONS interviewers will be given a separate card.

FUNCTION	OLD KEY(S)	NEW KEY(S)
Don't Know	[left sq bracket	Ctrl + K
Refuse] right sq bracket	Ctrl + R
Make a note	Ctrl + F4	Ctrl + M
View more codes	Ctrl + End	F6 *
Jump to...	Ctrl + F1	F3
Help	<i>n/a</i>	F9
Show all Notes	<i>n/a</i>	Ctrl + Z
Suppress a warning	Shift + F3	S
Start Calculator	<i>n/a</i>	F4

* The screens have been changed so that you should be able to see all the codes and not need to use this.

- **On-line help**

For some time now we have wanted to put key points from your paper instructions in the computer so that you could access definitions and guidelines at the touch of a button. This is now possible, but the pressure of time has meant that only a few key questions in the household part of the questionnaire have a 'Help' entry. It is presently being worked on and program updates throughout the year will expand this Help facility for you. The question text will indicate when Help is available. To see the Help screen, press F9. Pressing F9 at any time can also help to identify where you are in the questionnaire. A box will open up, at the top of which will be shown which schedule you are in, the block name and question name, which corresponds to the reference system used in the interviewers instructions.

- **A word about the checks and warnings**

The box which appears when a check is sprung works slightly differently in Blaise III. The front of your question instructions contains more details.

- **Harmonisation**

The process of Harmonisation aims to ensure that large Government surveys use the same question wording and answer categories, where applicable. This year, a number of existing questions have changed slightly and some other new questions have been introduced. These will ensure that results across different surveys will be comparable. There are also harmonised question instructions for many of these questions. For some of them, additional FRS-specific notes are included in the question instructions.

- **The end of the Disability Survey**

The Health and Disability Survey finishes at the end of March 97. A special thanks to you all for the extra hard work that this entailed.

PART 3:

The Main Questionnaire changes...

Household grid

This has undergone a number of changes. Children are now recorded in the same grid as the adults, so there is no separate grid for children. Members of a household can be entered into the grid in any order. Relationship codes are still the same, but the answer codes will always be gender-specific. Thus, if you are recording the relationship of a male person to a female person, the relationship codes will read 'mother, sister, sister-in-law' etc. The very first question at the grid asks *"Who normally lives at this address?"* and replaces the previous question *"Please tell me the name of adult number...etc."* Note a change of practice which allows same-sex couples to be recorded as such at the 'relationships' question. However, they will be allocated to separate benefit units.

Head of Household

You are now asked to identify the Head of Household following the question *"In whose name is the property owned or rented?"* which is now asked immediately after the household grid. The standard Head of Household definition applies.

Entry phones - new question

If the respondent lives in a flat (or part of a house) you will be asked an observational question; *"INTERVIEWER CODE: IS THERE AN ENTRYPHONE?"* This will help when comparisons are done between people who do and do not take part in the survey.

Mortgage questions

Following a review of this section, the mortgage questions have been simplified (no references to 'top-ups') and the whole section should be simpler and quicker. For any mortgage not for purchase, the full set of questions is only asked if it was for 'essential repairs'. In more detail;

Four questions can now be found just before the 'mortgage section'. The first question asks when the property was bought. The second is a new question;

"Can I just check, did you take out one loan to purchase this accommodation or more than one?"

If there are two separate loans **for purchase**, we ask about each one separately.

The third question asks for the purchase price of the house or flat and the fourth, the estimated worth of the property. The mortgage section then 'begins' asking the questions that you are familiar with. It should be simpler though. It was found that the issue of 'top-up' loans was sometimes confusing and distorted the results so these are no longer asked about. There is a question at the end about any other loans secured on the property, but only if a loan is for 'essential repairs' to make the accommodation fit for occupancy' will there be any follow up questions. You should find the whole section smoother.

Income from other properties

We currently have a question asking about rent received from a second property that a respondent may own. Not all of this rent could be considered to be 'income', however, as there may be a mortgage and upkeep to pay on the property. The Inland Revenue have specific definitions for such a calculation of income, and this has resulted in a new showcard and a rephrasing of the question;

"How much rent has [name] received before tax from other property in the last 12 months, AFTER paying for any of the things on this card?"

CARD

1. *Repairs, maintenance and renewals (do not include capital improvements)*
2. *Interest on a loan to purchase the property*
3. *Rent, rates, insurances paid on the property*
4. *Legal and professional costs relating to the purchase.*
5. *The cost of services provided (cutting grass, maintenance etc.)*

Council Tax

This section of questions is largely unchanged although there are some new checks to catch people who may confuse a single adult discount with a rebate. An interviewer had pointed out that a lot of people have payments books for Council Tax, and this is now reflected in the wording at CTCondoc.

Insurance Policies

Until now, the questionnaire asked only about the sorts of insurance policies that covered different members of the household. There is now a follow up question asking about the premiums paid for each policy held.

Hospital treatment

The Department of Health requested further information in the questions about treatment.

A new code at NHS;

- NHS: In the past 4 weeks have you/any of you*
- 1 *pres...received something on prescription*
 - 2 *dent...visited the dentist for an NHS examination*
 - 3 *eye....had an eyesight test*
 - 4 *specs...purchased glasses or contact lenses*
 - 5 *hosp...or been to hospital for NHS treatment?***

If NHS = code 5, a follow-up question: *"Did [name] get any money back at the hospital, for travel costs? (yes, no) is asked. In addition, the question "Was it free of charge or did [name] have to pay for it?" is asked of sight tests and purchase of glasses as well as dental treatment.*

Continue/suspend

We have decided to **drop** the Continue / Suspend mechanism for the April program. We believe that this is hardly ever utilised by interviewers and it was affecting the speed of the questionnaire.

Education questions

All the questions previously asked in the household questionnaire will now be asked just after the health questions in the Benefit Unit schedule. They will be asked of each adult, and then for each child. Although there are some new questions, better routing should mean that this set of questions will be simpler and quicker. There are a number of follow up questions such as "How much was that?" and "How long did it cover?", but these are not shown below. The sequence of questions is as follows (the first 4 questions, and many of the others, have always been asked. New questions are marked with a *. Please read the instructions for these new questions to familiarise yourself with the new definitions of 'education' and 'tuition');

"Are you at present receiving any full or part-time education - including leisure classes and holidays?" This is not asked if it is already evident from the household grid that the person is in education. Note that leisure classes and holiday breaks from a class are to be regarded as education.

- * *"How many hours tuition do you normally receive each week? Only include time spent in lectures, seminars, and practicals where a tutor is present." INTERVIEWER: IF NONE (EG. DISTANCE LEARNING), ENTER '0'.*

*"Is that ...
...just in the daytime
...just in the evenings
...or both?"*

"What type of school or college do you attend?"

This question is not asked if the answer is already known from the household schedule because the person is still in continuous education.

"Are you receiving an education grant, maintenance grant or scholarship?"

- * *"Have you received any contribution from your parents in the last 12 months?"*

"For your course, are you eligible to receive a Student Loan from the Student Loan Company?"

- * *"Have you been a student at college or university at any time since 1990?"*

This is asked because we need to identify people who might have taken out a student loan, who are asked the next question;

- * *"In the last 12 months have you made any repayments of a Student Loan from the Student Loan Company?"*

"Some students get money from an access fund provided by their college or university to relieve hardship. Are you receiving any REGULAR payment from such an access fund?"

"Do you have any other loan to enable you to attend a course of education?"

“Have either of you any children aged 16-24 OUTSIDE this household, how are currently receiving full or part-time education?”

Obviously, only some of the above questions are asked of the children.

Last worked

A new question is asked of those who are not working;

“(May I check), have you ever had a paid job or done any paid work?”

If yes,

“Which year did you leave your last PAID job, either as an employee or self employed?”

If less than or equal to 8 years

“Which month in that year did you leave?”

State Benefits

This section has had some changes. The annual uprating of the benefits each April have been incorporated into the new questionnaire program. The old rates are still permissible, but please take extra care in April and May to record the correct amount that they received **last time** whether it is an old or new rate.

Jobseeker’s Allowance (i)

There are now some more detailed follow up questions to recipients of Jobseeker’s Allowance. One of the most important new questions is;

“There are two types of Jobseeker’s Allowance. Is your Allowance...

..... ‘contributory’, that is based on your National Insurance contributions, or

..... is it ‘income based’ Jobseeker’s Allowance; which is based on an assessment of your income?

It will be helpful if interviewers are familiar with the difference between contributory and income based JSA. There are a number of checks to try to catch people who say they get one type but most likely receive the other kind. Please read your instructions (and your pocket guide to benefits) for further information.

Jobseeker’s Allowance (ii)

DSSPay records deductions from Income Support for things such as mortgage interest, rent arrears, service charges etc. A persons Jobseeker’s Allowance (Income Based) can also have such deductions made and therefore the question (and follow ups) will also be asked of people in receipt of Income based JSA as well as Income Support recipients.

One Parent Benefit

This no longer exists as a benefit in its own right, but there is a new Lone Parent rate of Child Benefit. Watch out for people volunteering that they get One Parent benefit. They won’t anymore, but you will have collected the relevant details under Child benefit.

State Pensions

There are additions to the list of PenQ components which are recorded for Retirement Pension, Widow's Pension or Widowed Mothers Allowance when an order book is consulted. In the past you have had to enter an amount for every possible component, even if this was £0.00, which would take even longer with the additions. Now, each component shown on the order book will first be recorded at a multi-code question, followed by the amount for each that applies.

Attendance Allowance and Disability Living Allowance

Attendance Allowance and Disability Living Allowance can be paid as components of Retirement Pension, Widow's Pension and Widowed Mother's rather than as separate benefits. In order to avoid undercounting their receipt, we now want you to code them at Ben2Q even when they are paid as components of the Pension(s). In order that the correct questions are asked about the amounts received, there are new follow-up questions if Attendance Allowance or Disability Living Allowance is received as well as Retirement pension, Widow's Pension or Widowed Mother's Allowance;

AA/DC/DM

"Is this [Attendance Allowance] [Mobility Component of DLA] [Care Component of DLA] paid as part of your [Retirement pension] [Widow's Pension], [Widowed Mother's Allowance] or do you receive it separately?"

- 1. Paid as part of Pension*
- 2. Paid separately*

If the answer is 'Paid as part of pension', no *separate* questions will appear for AA - except to ask who the person receives it for (*WhoRec*).

Widow's Payment

This is a one-off payment of £1,000 and listed on the showcard with other one-off benefits. Previously, the practice was to record it at the 'Any other State Benefit' code.

The end of the interview

As before, there are questions at the end of the interview such as whether a person is willing to do a possible future survey. If, however, the assets questions need to be asked, these questions are asked at the end of the assets section. If the Benefit Unit is **not** eligible for assets questions, the final questions are found at the end of the Benefit Unit schedule as before.

Personal Outcome Codes

Previously, an outcome code for each individual was recorded in the Benefit Unit admin block. As this no longer exists, the question "Was this a personal or a proxy interview" now appears at the very end of the interview alongside the 'future willingness' question (either at the end of the BU or the end of the assets block).

Exit via Admin

It is still essential to leave the questionnaire via the admin block. A number of changes have been incorporated in the admin block which looks quite different from the old household admin. Most of the changes are in line with the development of a standard admin block that will be similar across most CAPI surveys.

On selecting the Admin block, there are 2 questions just prior to the *Choice* question. Both questions used to be at the end of the Benefit Unit. They are the questions which ask you to confirm the presence or absence of a telephone, and the follow up asking for the phone number. This question has actually been changed slightly,

“Some interviews in any survey are checked by Head Office to make sure that people like yourself are satisfied with the way the interview was carried out. Just in case yours is one of the interviews that is checked, it would be helpful if we could have your telephone number.”

Admin at Home

There are a number of important changes to the admin block. Please refer to your new admin block instructions for details of the new questions and procedures.

Non response questions

The DSS have requested some basic information about the types of household that refuse to take part (or who result in non-contacts). Knowing even the basic details about such households can be very useful in knowing where the FRS data is not as statistically representative as it might otherwise be. You will firstly record the non-response details on paper (on the back of the ARF for SCPR interviews, on a separate form for ONS interviewers) and then key it into the laptop later. The results will be analysed and the DSS will be given a report based on the non-response questions at the end of each year. For full details, see the separate instructions.

[SCPR only] Scottish pre-selection sheets

Scottish interviewers had pointed out a problem in the admin block. The question *“How many households did you find at this address?”* is poorly worded when a pre-selection sheet has been used. If the interviewer entered ‘2 or more’, a check sprang, and three irrelevant questions came on the route. There is now a separate question *“Is this address covered on a pre-selection sheet?”*. If ‘Yes’, the wording at the next question will be slightly different;

*“How many households were **selected** for interview at this address?”*

The check which reminds you to open up a new household before transmitting the existing one back, will then only spring when absolutely necessary.

PART 4: Minor Changes

HOUSEHOLD SCHEDULE

Address

The question which asks you to confirm that the address is correct has been moved to the beginning of the household schedule. You will still need to record it on the ARF/Recall card.

Yearlive

The answer categories at this question have been amended in the latest Harmonisation booklet.

1. Less than 12 months
2. 12 months but less than 2 years
3. 2 years but less than 3 years
4. 3 years but less than 5 years
5. 5 years but less than 10 years
6. 10 years but less than 20 years
7. 20 years or more.

MainAcc

When interviewers are asked to code whether the accommodation is a house, bungalow, flat etc, a new code is allowed. A *Room/rooms* can also be coded.

Renting a furnished property

The question *Furnish* which previously asked renters whether the property was rented as furnished or not, has been changed. The following wording now applies, and is also asked of those who live rent-free.

"Is the accommodation provided;

1. *Furnished*
2. *partly furnished (e.g curtains & carpets only)*
3. *or unfurnished?*

Shorthold tenancies

There are new codes at *Ystart*.

1. *1988 or earlier*
2. *From 1989 to February 1997*
3. *March 1997 or later*

and two version of the question *Short*. The first applies to people who started renting between 1989 & 1997 (code 2);

There is a form of tenancy called a shorthold. It is for a fixed period and you had to be given a notice in writing by the landlord that told you it was a shorthold tenancy agreement. Here is an example of a notice to a tenant saying that the agreement is an assured shorthold. SHOW EXAMPLE OF NOTICE.

Does your agreement or notice state that it is an assured shorthold or not?

- 1: *Yes, an assured shorthold*
- 2: *Other agreement*

The second version is asked if they took out a tenancy agreement after March 1997; *Most tenancies are assured shortholds which are for a fixed period. There are others, just called 'assured', which are not for a fixed period. For these you have to be given a notice in writing by the landlord that tells you it is NOT an assured shorthold agreement.*

Does your agreement or notice state that it is NOT an assured shorthold?

1: *Not an assured shorthold*

2: *Other agreement*

Housing Benefit changes.

The question asking people if they have a Housing Benefit statement has been moved to the beginning of the block of questions, after *Hbenefit*. Also, the question "*Can I just check, is the amount of [rent] that you mentioned earlier, BEFORE or AFTER taking off the Housing Benefit?*" is now asked of everybody who receives Housing benefit.

Officially, the term 'rent allowance' should be used for all private renters, and the wording of a couple of questions has been changed to reflect this.

Mod Cons

Harmonisation has meant several minor changes here. The opening question now reads "*Does your household have any of the following items in your (part of the) accommodation?*"

There are no longer questions about ownership of a separate fridge or mobile phone. The question about satellite dish also includes cable receivers.

If yes,

"Which year did you leave your last PAID job, either as an employee or self employed?"

If less than or equal to 8 years

"Which month in that year did you leave?"

Rent questions to Boarders, Lodgers and sharers

The questions asking how much rent people pay have been expanded slightly to make it explicit that we want the figure after Housing Benefit has been deducted.

SRentAmt: "How much rent did [name] pay last time it was due, after deducting any Housing Benefit?"

CVPay: "How much rent did [name] \$TXT80 last time it was due, after deducting any Housing Benefit?"

Housing Benefit

DSS requested that we change the routing of *HBenChk*, "*Is the amount of £rent that you mentioned earlier, before or after taking off the Housing Benefit?*" so that it is asked of all Housing Benefit recipients. There was some evidence that some respondents were quoting a gross figure instead of their net payment.

Scottish sewerage

Not wanting to miss out on the action, the Scottish questions needed attention again. From 1996, sewerage charges, (as well as water) are shown on the Council Tax bills. Like water, the sewerage amount should be separately identified (because CTB will not pay for it.)

CTAnnual

"On the statement/bill, what is the total amount payable for the year, [Scotland] including Council Water & sewerage charge after deducting..." etc.

CSewAmt

"...and how much for Domestic Sewerage Charge?"

BENEFIT UNIT SCHEDULE**Working**

A help screen has been added to remind interviewers that some people should not be coding as working. This is slightly different to the harmonised definition on some other surveys;

Interviewer: do NOT include ODD JOBS, BABYSITTING, or MAIL ORDER AGENTS as "paid work".

Paid Work

Harmonisation proposes a different wording for the questions called LstWrk2/1 ("When did you last do any paid work?"). The inclusion of a new question can also enable routing to the question only if they have ever had a paid job.

"(May I check), have you ever had a paid job or done any paid work?"

Endowment Policies

The question *MenStYr* "In what year was this insurance taken out?" is only asked of people with an endowment policy, and interviewers have commented that it would be clearer to use the word 'endowment' rather than 'insurance'. This is now the case.

ChPay

When asking about childcare costs, there is a new code to cover the use of Nursery Vouchers.

1: Payment in kind

2: Exchange basis

3: Vouchers under the Nursery Education Vouchers Scheme

4: Other

5: No (other) cost or payment of any kind

Statutory Sick Pay

The question "Is the Statutory Sick Pay being paid at the higher rate or the lower rate?" has now been dropped as the distinction no longer applies.

Widows Pension

Widows have never been asked the *PenQ* questions in relation to a Widow's pension, although they are relevant. From now on, widows follow the same route as recipients of NI retirement pension and those receiving Widowed Mothers Allowance.

Pensions

Corrected wording of *EpRRgts* was needed and is indicated by the underline.

"Which of the statements on this card best describes what has happened to the pension rights you built up in that scheme?"

Two questions about personal pensions which were previously asked only of the self employed (*PPNum* & *PPDat*) will also be asked of employees.

They are "How many such pension so you currently have?" and "When did you take out this pension?"

Babysitters and Oddjobs

To conform to harmonisation we have re-worded a couple of questions in the benefit unit:

BabNow: "Have you done this work in the last 7 days, since [day and date]?"

OjNow: "Did you do this job in the last 7 days, since [day and date]?"

Children's Accounts

At the question *Chinc* the answer codes for children differs from that of adults and so the Bank and Building society codes have been merged to match the question asked of their parents.