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).

- SSPSMPFG (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 used household level variables.

- GROSSPAY (ADULT) Deleted as used last pay and usual pay. Should use UGRSPAY for individual jobs or INEARNS 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

- INEARNS (ADULT - Gross income from employment) This now sums all occurrences of UGRSPAY pay. This shouldn't change its output.

- NINEARNS (ADULT - Net income from employment) uses SSPADJ/SMPADJ variables and only makes an adjustment when one is made to UGRSPAY using the new SSPSMPFG (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

- TOTSAVBU (BENUNIT – Total savings of BU) This now includes the new category for TOTSAV = 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).

CHANGES AND ADDITIONS TO 1998-99 DERIVED VARIABLES

1. Introduction

This paper outlines the changes made to the derived variables (DVs) between 1997-98 release D and 1998-99 releases 1. It also highlights any new DVs created during the past twelve months.

2. 1998-99 Derived Variables

2.1 Background

The derived variables for 1998-99 are listed in the DV table in *G:\public\frs\dvars\1998_9\Dvtable.xls* (previous years DVs are located in similar location). Any changes made or new DVs created are noted in the final column. The table gives a brief description of the DV and whether the DV is on the flat-file (including flat-file name). Some DVs use constants, which have been updated. These are contained with in the Dvmeta spreadsheet *G:\public\frs\dvars\1998_9\Dvmeta35.xls* (temp formats and temp informats). Please speak to some one in the FRS team if you need further information on this. All the DVs have a specification. These describe what changes have been made each year, define the output and give a description of how the DV is written. These are located in *G:\public\frs\dvars\1998_9\specs\'spec name'v35.doc* Please speak to a member of the FRS team if you require the DV code.

2.2 New DVs

All the new DVs listed below are also available on release d of the 1997-98 data.

Age Bands

There are four new age band DVs, two on an individual level, one on a benefit unit level and one on a household level. The first two are **BUAGEGR2** and **HHAGEGR2,** which give the age of head of benefit unit and household in 10-year age bands. The other one is **IAGEGRP,** which is on both the adult and child tables.

Care variables on child table

The existing care DVs are now also on the child table. These all have the same structure as the adult ones and also have the same names.

Tax

The **TAXPAYER** DV flags up whether or not a person should be paying tax by looking at a person's gross income and their tax thresholds. A value of one means the person should be paying tax. The DV is on the adult table.

Work related

There are two new DVs related to work. The first one shows how long it is since the head of benefit unit last worked (**LASTWORK**) and is on the benunit table. The second is **TTWMODE**, which is on the adult table. This shows what mode of transport a person uses to get to work.

Household and Benefit unit composition

The **HHKIDS** DV is a simplified version of HHCOMPS. It splits households into; households with and without children, by number of adults in the household and by sex in some cases. The **BUKIDS** DV is slightly different in that it looks at single and couple benefit units and how many children they have. They both have different formats, ie using **BUKIDS** 1=two parent family with one child. Using **HHKIDS** 1=household with children and one adult.

Banded income

This divides total household income into £100 bands. It is called **HHINCBND** and is on the household table.

2.3 Changes to DVs due to changes in the Questionnaire

Services included in rent

These questions all relate to what is included in a household's rent. Due to the high level of imputation on a small number of cases it was decided along with the Survey of English Housing to set these values to constants. These are based on allowances used to calculate Housing Benefit. For more information see 'Estimate of cost of services included in private rents' paper. This is available on the G drive at *G:\public\frs\docs\1997_8\survey english housing.doc.* This affects the **HHRENT** DV, which in turn affects **BURENT**, **BOARDER** and **LODGER**.
The amount of housing benefit is now included in the **BOARDER** and **LODGER** DVs. It has therefore been removed from the **BURENT** DV to stop double counting.

Charity Tax allowances

The questions on 'whether under taxfree payroll deduction scheme' (CHRAMTF) and 'whether any deductions for other charities' (CHROTH) have been deleted and replaced by 'How much deducted for charities'. This has meant a change in the code for the following DVs: **INEARNS, INDINC, NINEARNS, NINDINC, GROSSPAY** and **UGRSPAY.** The only effect is that the code and spec now looks slightly different and makes no difference to the amounts added.

Government Training

The government training scheme question has now got an extra category for 'New Deal for 18-24 year olds'. This doesn't affect the out come of the DVs but does mean that there is a slight change in the code and specs for the following DVs; **EMPSTATB, EMPSTATC, ECOTYPBU** and **DEPDEDS.**

Method of Transport

In previous years there were six separate questions for each different method of transport. For this year there was only one question with nine possible outcomes. This means that the question now picks only the main method of transport instead of all methods. This means the DV now gives the main method of transport to work only. The categories have also been increased from six to nine.

Whether registered disabled (Job Centre)

This question has been deleted, but all the people who fall into this category are picked up by other similar questions. This affects the **ECSTATBU, EMP, EMPHOH, PENAGE, PENHOH, SICK** and **SICKHOH** DVs.

Income form royalties (ROYAL1→4)

There is now an extra category for 'Rent from any property'. ROYAL1 has replaced the PROPRENT base variable and so ROYAL1→3 have moved to ROYAL2→4. This affects the **OCCUPNUM** and **NETOCPEN** DVs. In these cases the output is unaffected.

Baby-sitting and Mail order agents

These questions have moved from the ADULT table to the ODDJOB table. They now come under the ODDTYPE=1 and 2. This effects the **INRINC** DV code and spec but does not change the output.

Removal of the PROPRENT question

PROPRENT has been removed from the CHILD table. This question asked whether a child got any income from rent on a property. This question has been removed and not replaced. There were no cases in 1997-98 and so any effect on this year's data will be minimal. This affects the **CHRINC** DV.

Removal of SSP and SMP

Statutory Sick Pay and Statutory Maternity Pay have been removed from the BENEFITS table (Benefit = 10, 23) to remove the chance of them being counted twice. They are now only on the JOB table under SSPAMT and SMPAMT. This has a direct affect on the following DVs code and spec: **INNIRBEN** and **INOTHBEN.** The change does not affect either DVs output. These changes feed into the following DVs: **BUNIRBEN, HHNIRBEN, BUOTHBEN, HHOTHBEN, INDINC, BUINC** and **HHINC.**

Changes to Extended Housing Benefit and Extended Council Tax Benefit

Extended HB / combined HB/CTB (Benefit = 28) has been split up and moved to Benefit = 78 - Extended HB and Benefit = 80 - combined HB/CTB. Extended council tax benefit has also moved from Benefit = 29 to Benefit = 79. This affects **INIRBEN** and **INDISBEN** but does not change their output. These changes feed into the following DVs: **BUIRBEN, HHIRBEN, INDINC, BUINC** and **HHINC.**

Simon Brown
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INTERVIEWER'S GUIDE

TO CHANGES

Family Resources Survey 1998 - 1999

FRS v.35

April 1998

INTRODUCTION

This year we have made further efforts to slim down the size of the questionnaire. We have had a lot of support from the research team at the DSS, who are well aware that when an interview continues on for too long, it can have a harmful effect on data quality, and make the respondent less willing to take part in a future DSS survey. However it is not easy to find questions to remove.

1. The process began with a trawl for **questions to delete**. We put up suggestions and the DSS circulated them to every user of FRS data, and asked *them* for ideas, too. From this process, around **27 questions** were agreed for deletion.

2. The DSS also decided to slim down the 'Services in Rent' section, which resulted in a further **11 questions** deleted (including all questions about amounts of services).

3. To move the interview along a bit faster, some questions are now **combined**: on Baby-sitting & Odd jobs; Income from Property (moved onto a showcard in the benefit unit); and on the incomes of individual children.

4. Interviewers told us that the 'Introductory Screens' (eg. "THERE ARE NOW SOME QUESTIONS ABOUT …") were slowing things down. So we have dropped several of them.

5. We did some 'cognitive testing' of the Rent and Council Tax questions, because some respondents found them difficult and confusing.   Now, simpler wording (and some deletions) should help these sections run more smoothly.

6. Interviewers asked us to improve the flow of the Benefits section. Now, when interviewing a couple, you switch between them one question at a time (rather than ask *all* questions first of one person, then the other). We have also been able to drop a Benefits question and showcard.

7. The over-70s are no longer asked about their availability for work.

8. Finally, from the **nonrespondent questionnaire** we have dropped the question about Benefits, and the Age question is now banded.

WHAT ELSE IS NEW?

You will see fewer changes or new questions than in previous years. This is only to be expected, as the FRS 'beds down'.

Users are very interested in the **educational qualifications** people have, and there are 3 new questions on this subject in the benefit unit questionnaire. They are very simple, 'opinion' questions, without a showcard or any listing of specific qualifications.

There is a new question about **flexible mortgages** and another on **shared ownership**.

The Department of Health have extended their questions about **free prescriptions and dental treatment**, to ask some people how they qualify for the free items/ treatment.

The **Travel to work** section has been amended to match the National Travel Survey and the Labour Force Survey.   (We no longer ask for travel ticket 'Pass dates', for instance.)

A new question for people who can't work due to an **illness, injury or disability**, asking which year they first stopped work from this cause.

The government's **New Deal for 18-24 year olds** is listed at the 'Training' question, and there's a further question to check which New Deal 'Option' people are on.

A follow up question for people on Income Support, asking if it includes any **maintenance for children** (from the Child Support Agency). DSS analysts are particularly interested in this issue. (The later question about maintenance is introduced: *"Apart from the maintenance in your Income Support…"*)

The process of **'Harmonisation'** of Government surveys aims to ensure that key issues are dealt with in a comparable way in questionnaires. Some FRS questions have changed slightly, in line with this, and a few questions have been added. We have also added some harmonised 'Help' screens.

In line with our new contract with the DSS, and to improve the quality of the data, we have tightened up on the number of **'Don't knows' and 'Refusals'** at 'amount' questions. Previously, the most allowed was 24 in the household + benefit unit 1 (HoH) questionnaires. We've reduced this to 12. Each subsequent benefit unit is allowed an additional 12. Based on past performance, we don't think this change will create any problems for you. If it does, we will take another look.

A note about dates

We are very sorry about the problems some of you experienced in the first two months of this year, with the program not accepting a date of **'1998'** at some questions, eg. those relating to mortgages and the start date of a job. This was our fault - we failed to provide a program update at the right time. Thanks for your patience, and for making notes so that editors can put in the correct year.

To avoid this happening next year, we have already extended the range at those questions to include **1999**. However, a check has been added to prevent accidental keying errors during 1998.

Another date problem we've fixed: when the interview date was a Sunday, the 'reference date' was being quoted (ie. in question wording) as the *next* Sunday!

A note about showcards

One result of having deleted some questions this year is that three of last year's showcards are no longer in use. If we simply dropped those cards, the lettering sequence would change, requiring a very expensive re-printing of cards. It would also change in the program, requiring careful re-programming and testing.

Rather than do this, we have decided to insert three '**blank'** cards in your sets, which simply act as placeholders, marking where the three cards were dropped. This allows us to keep some of the same lettering as we had last year (ie. to re-use the same cards). The blank cards are J, M, and CC. Each one simply says:

THIS CARD IS NOT IN USE

Even with this strategy, the high volume of showcard **amendments** has meant issuing you with 23 replacement cards. 22 cards remain the same as last year, and can be re-used. Details of showcard changes are provided in the Appendix.

HOUSEHOLD SCHEDULE

Date of Interview

When you enter the date on which the interview started (at 'StartDat'), there is now a soft check if the year you enter doesn't match the fieldwork year, as stored by the program.

HOUSEHOLD GRID

Age on leaving education ('TEA')

If people have never received full time education, they are now coded '97', rather than '0'. (Age '5' is now the lowest possible age.)

Type of school: 'Special school'

People aged 16-19 who attend a 'special school' may form a separate Benefit Unit. However the program previously assumed they were still dependent, and attached them to another benefit unit, which caused problems. A new question follows 'TypeEd' to clarify things for people attending special schools:

SchChk *"INTERVIEWER: PLEASE CHECK: DOES ANYONE STILL RECEIVE CHILD BENEFIT FOR THIS PERSON? PRESS '1' IF YES, TO CONFIRM THEY STILL BELONG TO SOMEONE ELSE'S BENEFIT UNIT (OR '2' IF NOT)."*

Respondent's age when widowed

Previously, only female respondents who said that they were a widow at the marital status question were followed-up with a question about the age at which they were widowed. From now on male widows, too, will be asked this.

Ethnic Group for children

As a result of interviewer feedback on the awkwardness and antagonism that this question could cause in some households, it is no longer asked.

Head Of Household

Previously, there was a hard check if you entered a female respondent as Head of Household. This has been downgraded to a soft check, and an additional instruction has been added:
*"For a married couple the man is always Head of household. Please amend your coding. (**But if he is away for more than 6 months, suppress check and move on.**)"*

HOUSING TENURE - SHARED OWNERSHIP

Respondents with shared ownership - eg. half rent, half mortgage - are routed to questions about both their rent and their mortgage. However, interviewers and editors warned us that some people have already paid off the mortgage part, but were still having to go through all the mortgage questions. To identify these people there is a new question for shared owners, to which the answer *"paid off"* will route them past the mortgage questions:

SOBuy "Are you still buying this (house/flat), or have you now paid off that mortgage or loan?"

RENT AND HOUSING BENEFIT

Following a review, and some cognitive testing earlier this year, these questions have been revised. Question wording has been clarified, and a number of questions deleted. One major change is that after consultation with the Department of the Environment, Transport & the Regions (DETR) we have agreed that both the FRS and the Survey of English Housing will simplify the list of **services included in the rent**.

On FRS it has also been agreed that we no longer need to ask the **value** of these services, which is often difficult for respondents to establish. And, rather than having different questions for respondents who claim Housing Benefit, *all* renters get the same question about services.

Questions	Wording	What has changed?
RentDoc	"Do you have a rent book, rent card, Housing Benefit statement or some other rent document that you could consult?" : IF HB STATEMENT AVAILABLE PLEASE CONSULT THIS "Housing Benefit Statement" "Some other document", "None"	New question at the start of this section, for *all* renters - replacing 'HBStmt'.
Rent	"How much rent do you/ does your household currently pay?"	Re-worded question
HBenefit	"Are you allowed Housing Benefit or rent rebate, to help with paying your rent?" (Council tenants) "Are you receiving Housing Benefit or rent rebate, to help with paying your rent, either directly or by having it paid to your landlord?"	Council tenants: new wording Other renters: new wording

	(non-council tenants)	
HBenFuRd HBenRAmt HBenRPd	These 3 questions, asking whether your housing benefit is based on a reduced figure determined by the Rent Officer, have been **deleted**.	
HBAmt	"How much Housing Benefit/rent rebate are you allowed?" (Council tenants) "How much is your Housing Benefit/rent rebate?" (Non-Council tenants)	This question has been reworded
RentFull	"How much is your FULL rent - that is, BEFORE Housing Benefit/rent rebate?"	New question - if the respondent does not know the amount of their Housing Benefit (and Rent > 0)
HBenDed		This question has been **deleted**.
SerInc	"Does the rent which you mentioned include any services such as the ones shown on this card?" Heating Lighting Hot water Fuel for cooking	The list of services included in rent has been cut down to the 4 services of main interest.
ServAmt, HBSerAmt, HBSOAmt		Questions about amounts charged for services have been **deleted**.
SerIncW HBServ HBSvOth HBSOther	ALL renters are now asked the question 'SerInc', so these 4 questions are no longer required, and have been **deleted.**	

Minor Changes

There is now an interviewer instruction at 'SerInc' if the respondent said they had a document to consult: "PLEASE CONSULT DOCUMENTATION".

If the respondent is routed to the question 'RentFull' *("What is your FULL rent…?")*, they get a follow up question *"How long does that cover?"*

WATER AND SEWERAGE CHARGES

Previously, if a respondent received Housing Benefit, and consulted a document, they went to different questions asking about water and sewerage charges than the other renters. Now, **all** renters are asked the **same** questions, simplifying this section. Four questions have been removed ('HBWater', 'HBSewer', 'HBWSAmt', 'WorSinc'). If a rent document is being consulted, the instruction "PLEASE CONSULT THE DOCUMENT" also appears.

Questions	Wording (as before)

WSInc	"Were water or sewerage charges (rates) included in the rent which you mentioned?
WSIncAmt	"How much was included for [water/sewerage]?" *Routing : All renters are asked 'WsInc' and 'WSIncAmt'*

Minor Changes

If the amount of Rent is less than the amount coded at 'WSIncAmt' there is a soft check:
"The amount INCLUDED in rent for water/sewerage is GREATER than the rent!"

THE 'CHILDCARE DISREGARD'

Background: Housing Benefit and Council Tax Benefit take account of the cost of child care: money spent on this is 'disregarded' (not counted as income) when assessing a benefit claim. To be 'disregarded' the care must be provided by a *registered* person or agency. This can include creches, so our question about being registered ('Registrd') now comes on route for creches, as well as for childminders and nurseries.

We have moved questions about the 'disregard' on HB and CTB: these now come later, in the child care section. They now only appear if the if the child care provider is *registered*.   A recent policy change extends the 'disregard' to care given for children aged under 13, rather than 11 years. The routing takes this into account.

Question	Wording	What has changed?
Hbccdis / Ctccdis	"You said earlier that you get (Housing Benefit/Council Tax Benefit). Does this take account of the cost of the [childminder / nursery / creche]?"	Amended wording. Amended routing: if children aged under 13; and If child care provider is registered. Questions moved to child care section.

MORTGAGES

There are some small changes to this section - the addition of a Help screen, a question re-wording, and a new question about flexible mortgages.

Questions	Wording	What has changed?
BuyYear	"In which year did you buy this accommodation?"	1. The question wording has changed to harmonise the FRS with other surveys. 2. Now a KEY question: DK and refusal answers are not allowed.

EstWorth	"If you were to sell your house/flat tomorrow how much do you think (your share in) it would fetch?"	This question has now been **deleted.**

Lender	"Who currently provides this mortgage or loan to buy (your share in) this house/flat: is it….
	   ….a building society,
	   ….a bank,
	   ….other."
		Due to the recent flotation of some building societies on the stock market there is now a new Help Screen at this question, naming well known building societies that should now be coded as banks

MortFlex	"Some mortgages give the borrower the flexibility to make certain changes without asking their lender first, such as varying the amount or timing of payments, or taking breaks in some circumstances. Do you have a mortgage of this type?"	New question to follow 'MorInPd'. The DETR have requested that we include this question. Flexible mortgages only started about 3 years ago. The question is asked only of people whose mortgage started in 1995 or later
'MortProt'		Amended check: "Interviewer: for this type of mortgage there is normally a protection policy. Please check - is it included in the last mortgage payment? (If no policy, suppress warning and continue). "

HOUSE INSURANCE

The questions 'StrIns' *("What is the insured value of the structure?")* and 'FrnIns' *("What is the insured value of the furniture and contents, and/or the personal possessions?")* have been **deleted**.

COUNCIL TAX QUESTIONS

These questions have been simplified , and a couple have been deleted. The question asking about the amount of Council Tax paid has been re-worded:

<u>CTAmt</u>   *"How much Council Tax do you/does your household currently pay?"*

The separate question about formal exemptions from the Tax has been deleted ('CTExReb'). Instead, a new answer code is added to 'WhyNoCT':

"INTERVIEWER: NO COUNCIL TAX IS PAID, BUT NO BENEFIT RECEIVED. ASK OR CODE:
WHAT WAS THE REASON FOR PAYING NO COUNCIL TAX?"
1: Bill not yet received and household not previously liable for Council Tax
2: Bill not yet paid and household not previosly liable for Council Tax
3: Deliberate non-payment, in dispute, appeal
4: Household only recently moved into accommodation

5: Household has a 'formal exemption' from the Tax (all students; MOD property; all severely mentally impaired)
6: Other reason

The question about a **status discount** has been amended. Most people get a status discount because they are a single adult living alone, yet this response was often missed. Now the showcard has been re-arranged so that this option stands out more clearly.

> *25% or 50% DISCOUNT BECAUSE:*
>
> *There is only one adult living here*
>
> *This household includes:*
> *-a severely mentally impaired person*
> *-a person aged 18 or over who is still at shcool*
> *-a student*
> *-student nurses*
> *-apprentices*
> *-YT trainees*
> *-care workers*

The question about Council Tax rebate has been re-worded: *"Are you allowed Council Tax Benefit or rebate, to help pay your Council Tax?"* ('CTReb')

Respondents are no longer asked whether they received the benefit as a second adult rebate ('RebType' **deleted**).

A new policy means that the maximum Council Tax benefit awarded for people in bands F, G, or H is 'capped' at the amount for band E. The check on maximum benefit amounts reflects this.

INSURANCE POLICIES

An instruction to the interviewer has been added to the first question in this section ('Premium') to prevent information has being missed - some people will have insurance policies that are part of their **pension** plan or scheme, which we want to include here.

The question asking who pays for the insurance premium ('PolPay') has also been amended to allow the person insured *and* someone else to be paying (if the insurance is part of an employers' pension scheme, for example, both the respondent and employer may make contributions).

Questions	Question wording	What has changed?
Premium	"Do any of you have any insurance policies which cover you for any of the things shown on this card?" *PLEASE INCLUDE ANY INSURANCE PROVIDED BY AN EMPLOYER OR A PENSION SCHEME.*	New Instruction. The showcard now has the heading: **"<u>Insurance cover</u> (including cover provided by an employer, or a pension plan)"**
PolPay	"Who pays the premiums?" The person insured Someone else **Both of the above**	A third answer code has been added. If the answer is 'Both', the follow up question just asks how much the insured person pays (PolAmt)

VEHICLE OWNERSHIP AND USE

This section has been streamlined - now we only ask whether the household owns or has the use of a vehicle, what kind of vehicle it is (car, van etc.), and whether it is privately owned or a company car. The other follow up questions are not asked as this information is no longer necessary to users. The questions **deleted** are:

VehPer In whose name is it [owned / leased]?
VehUse For whose use is the [vehicle] principally provided?
VehProv Is the [vehicle] provided for [name's] use by...
VehPrice In which of these bands was the list price of the car when new?
VehEmp Does an employer provide all, some or none of the fuel expenditure…?

FREE NHS TREATMENT, PRESCRIPTIONS AND DENTAL VISITS

At the request of the NHS executive, a new question has been added for people who receive free items or treatments. The aim is to find out the qualifying condition that entitled them. There is a list of possible reasons for entitlement, from which interviewers are asked to probe to classify. If there is more than one reason, you can enter more than one code.

The question does not appear for everybody. There is no need to ask certain groups - pensioners, students in full-time education, young people under 18 (dental treatment) - since the free entitlement is automatic for these groups. The program routing takes care of this.

If people also received *"money back at the hospital, for travel costs"* ('Trav') then another new follow up question, similar to the one above, asks for the reason for that entitlement. The list of codes is the same.

Questions	Question Wording	What has changed?
WhyFree	"What was the main reason for that being free of charge? INTERVIEWER: PROBE TO CLASSIFY" :	NEW QUESTION following on from the question 'Free' Routing:

	1. Entitled through a social security benefit (IS, JSA, FC, DWA) 2. Because they have a charges certificate HC2 3. Due to a medical condition (or relative's medical condition) 4. Because they required strong 'complex' lenses 5. Expecting a baby* 6. Other reason	If aged 60+ and gets Prescriptions <u>only</u>, don't ask 'WhyFree' If aged <18 and gets Dental <u>only</u>, don't ask 'WhyFree' If in full time education FtEd=Yes (in Household grid) then don't ask 'WhyFree' * only appears for women age 14-60.
WhyTrav	"What was the main reason for this being free of charge?"	New question: same codes as WhyFree.

HELP GIVEN AND RECEIVED

It's possible we are under-recording the help respondents give to people living **outside their household**. They could be providing care for *more* than 1 individual in some categories - eg. they could be looking after more than 1 parent outside household / child outside household / other relative / friend/neighbour / client of voluntary information / other non-household member.   At present there is only space to record care given to *one* such person. To monitor the situation, we are asking you to make a Note to editors of any such cases. A 'Help' screen at the question 'NeedPer' reminds you.

BENEFIT UNIT SCHEDULE

HEALTH AND ABILITY TO WORK

The question *"Are you registered disabled with a Job Centre, under the Disabled Persons Employment Act?"* ('JcReg') has been **deleted**.

DSS are interested to know how long people have been unable to work due to any long-standing illness, disability or infirmity. A new follow up question and Help screen have been added. The extra information will improve the analysis of Incapacity Benefit, which is 'transitionally protected' for some people.

Questions	Question Wording	What has changed?
InjLong	"How long have you been unable to work because of this injury/illness/disability? IF IN DOUBT, CONSULT CALENDAR." :"28 weeks or less", **"Over 28 weeks, up to 1 year",** **"More than 1 year"**	An extra answer code has been added.
IncDur	"Can I check, in which year did you stop working because of this injury/ illness/ disability? INTERVIEWER: PROBE TO CLASSIFY" : 1995 or later Stopped work in 1994 Stopped work in 1993 Stopped work in 1992 Before 1992	New question if the respondent answers "More than 1 year" at the above question

EDUCATIONAL AND WORK-RELATED QUALIFICATIONS

Some new Harmonised questions are being tested on the FRS and the Survey of English Housing. They ask about educational and vocational qualifications, and whether these are at degree-level or not. They are **opinion** questions.

Question	Wording	Other information
EdAttn1	"Do you have any educational qualifications for which you received a certificate?" Yes / No	HELP screen : "Respondent need not have the certificate in their possession NOW - just must have received one once. We seek the respondent's opinion at each of these questions. Do not attempt to give any guidance, or express any opinion of your own about any of the terms used. If respondents say they are unsure what counts as "a certificate" or "degree-level" (or any other term), reassure them

		that we would like them to make their own best judgement of how to answer."
EdAttn2	"Do you have any professional, vocational or other work-related qualifications for which you received a certificate?" Yes / No	HELP screen : "Respondent need not have the certificate in their possession NOW - just must have received one once."
EdAttn3	"Was your highest qualification….. at degree-level or above, or another kind of qualification?"	Routing: if 'EdAttn1' or 'EdAttn2' = yes

EDUCATION: COURSES AND LOANS

The question 'AnyEd' has been amended to clarify that **holiday courses** do count as 'education'. Banks can now provide student loans at the same rates as the Student Loan Company, so the 'loans' question is re-worded. This section now benefits from an introductory screen.

Question	Wording	What has changed?
INTRO SCREEN	"THE QUESTIONS THAT FOLLOW ARE ABOUT EDUCATION"	New Introductory Screen
AnyEd	"Are you at present receiving any full- or part-time education - including leisure classes and **holiday courses**?"	Re-wording
TopUpL,	"For your course, are you eligible to receive a student loan?" ~~from the Student Loan Company~~	Deleted wording.
Check at TUBorr	*There is a soft check at 'TUBorr', if the student loan is greater than the maximum.*	This has been upgraded to the new highest amount of **£2,085**
TUBorr	"How much altogether will you borrow during this academic year, that is the year *beginning in September 1997 and ending in Summer 1998?"*	The highlighted text will be *updated* from July 1998 onwards for the new academic year

NEW DEAL FOR 18-24 YEAR OLDS

The government's new employment and training program has already started in 12 pilot areas and is being introduced nation-wide in April (not to be confused with the

New Deal for Lone Parents, a program offering advice and help with job applications, which is currently being piloted).

The FRS is *not* trying to measure participation in the New Deal - we just need to make sure the questionnaire can cope! There are five New Deal 'Options':

1. the Gateway - *an introductory period*
2. Employment option - *a job with an employer*
3. Full time education or training
4. Voluntary Task Force - *working for a voluntary organisation*
5. Environmental Task Force

Some of these people will say 'yes' to the question *"Did you do any paid work in the last 7 days…?"* ('Working'), while others will say 'no'. For anyone not doing paid work, the next question asks *"Were you on any of the government schemes for employment training shown on this card?"* ('Train'). **New Deal** has been added to the card.

If people select 'New Deal' you then ask which Option they are on, coding from the list shown above. The real purpose of this question is to catch people who are on the Employment option: a soft check suggests they have come here by mistake and should go back to 'Working', and change the answer to 'yes'.

Finally, because some New Deal participants receive an allowance, they will be asked *"What was the amount of allowance…?"* ('PrgAmt'). Those people on the 'Gateway' don't get asked this question, because they continue to receive Jobseeker's Allowance.

AVAILABILITY FOR WORK IF OVER 70 YEARS OF AGE

Interviewers remarked that some elderly respondents thought it odd, even offensive, to be asked if they were available and looking for work. The DSS has decided that the following questions can be bypassed for people aged 70 + years:

Look *"Thinking of the 4 weeks ending [date] were you looking for any kind of paid work or government training scheme at any time in those 4 weeks?"*

Wait *"Were you waiting to take up a job that you had already obtained?"*

LikeWk *"Even though you were not looking for work in the 4 weeks ending [date], would you like to have a regular paid job at the moment, either full- or part-time job?"*

NoLk *"Are you prevented from seeking work by any of the following*
  (Illness "…disability or illness?",
   Caring "…caring for a disabled or elderly person?",
   Children "…having to look after child(ren)?",
   None "(None of these)")

NoLook *"May I just check, what was the main reason you did not look for work (in the last 4 weeks)?"*

NoWant May I just check, what was the main reason that you did not want work (in the last 4 weeks)?"

EMPLOYEE PAY DETAILS

We no longer ask detailed follow up questions about any deductions from wages for **charities**. Questions have been deleted, and replaced by a new question.

DSS are interested in keeping up with the **benefits received** from an employer ('InKind'), and there are some new items here. And, if you code *'medical insurance'*, a follow up questions asks if that includes 'permanent health insurance' or 'critical illness insurance'. If you code *'other benefit',* you then need to describe it.

Questions about **luncheon vouchers** and **free meals** have been deleted.

Question	Wording	Change?
ChrTaxF AmrTaxF ChrOth AmtOth	(Details of deductions from pay for charity)	These questions have been **deleted**
ChrAmt	"How much was deducted for charities?"	New question
InKind	Which, if any of the benefits shown on this card have you made use of, or received, from your present employer in the last 6 months? "Luncheon Vouchers", "Free meals (including free canteen at work)", "Subsidised canteen", "Free or subsidised goods **(incl. store vouchers)**", **"Childcare provision and/or childcare vouchers** "Free or subsidised medical insurance for self or family", "Shares or share options", "Payment of school fees for family members", **"Provision of a phone for personal use as well as work"** **"Any other benefits in kind"** "None of these"	Some **new codes** at the question
OthPerk	"INTERVIEWER: DESCRIBE OTHER BENEFIT(S)"	New text question
InsType	"Can I check, does that include 'permanent health insurance' or 'critical illness insurance'?" "permanent health insurance", "critical illness insurance", "both" "neither" "don't know"	New question if 'medical insurance' coded at InKind
LV7Dy LVAmt FreeMI	Follow up questions about luncheon vouchers and free meals (received in last 7 days; value/number)	These questions have been **deleted.**

FrM7Dy		

Minor Changes

With the removal of Statutory Sick and Maternity Pay from the benefits section (see later), we need to be sure to record any SSP and SMP cases in the employee pay section. This happens at the question *"Did your last wage or salary included any of these items….?"* (InclPay), which comes up for (a) current employees, including people who are away from their job at the moment ('JobAway' = 'yes'), and (b) also now comes up for anyone else who has worked in the previous 12 months.

Earnings before retirement: the question for people who have retired, about gross earnings from their job in the 12 months before retirement ('RetPay'), has been deleted.

Amended wording of 'EverWrk' in line with harmonisation: ~~*(May I check), h*~~
"Have you ever had a paid job, apart from casual or holiday work?"

SELF-EMPLOYED EARNINGS

The questions asking whether self employment includes commercial farming activity, and what profit is made, have been **deleted** ('Farmer', 'SFFarm'.)

With the introduction of self-assessment, self-employed respondents may refer to their new **tax return** to quote a profit figure, so a new code has been added to the question about documents ('ProfDocs'):

> *"Annual accounts (incl. summary)",*
> **"Tax Return (self-employment section)",**
> *"Some other document (describe in a Note)",*
> *"No document consulted")*

If 'Tax Return' is selected, an instruction appears at the 'Profit' question, directing you to the part of the Return containing the relevant detail:

 "FROM TAX RETURN, ENTER THE 'TOTAL TAXABLE PROFIT' FROM BOX 3.89'"

A possible problem with the new tax return is that income from all sources (earnings, stocks & shares, etc.) is summed together, and income tax levied on the total. This makes it impossible to separate out just the tax on *self-employed* income, which is what we want. Therefore, if the Tax Return is consulted, an extra instruction appears at the tax question:

SeTaxAmt   How much did you pay altogether in the last 12 months?
INTERVIEWER: IF UNABLE TO GIVE SEPARATE AMOUNT, ENTER 'DON'T KNOW'.

TRAVEL TO WORK

The DETR has requested that the FRS Travel to Work questions are harmonised with similar questions in the National Travel Survey and the Labour Force Survey. This has resulted in the following changes:

Question	Wording	What has changed?
TTwFar	"About how far do you have to travel to your usual place of work?" 1. Work at, or from home/live at work 2. Varies-no usual place of work 3. Under 1 mile 4. 1 but under 2 miles 5. 2 but under 5 miles 6. 5 but under 10 miles 7. 10 but under 15 miles 8. 15 but under 20 miles 9. 20 but under 25 miles 10. 25 but under 50 miles 11. 50 but under 100 miles 12. 100 miles and over	A longer answer code frame, with finer gradations.
TTwMod	"How do you usually travel to work?" PROBE FOR MAIN METHOD 1. Car/van (include minibus/works van) 2. Motorbike/moped/scooter 3. Bus (include coach, private bus) 4. Train (formerly part of B.R) 5. L.T. Underground 6. Light Rail 7. Walk 8. Other	Delete "CODE ALL THAT APPLY", and insert 'PROBE FOR MAIN METHOD'. This is now a **single code** question rather than multi-code.
PssDate	"And how long is it valid for?" : 1: 1 week 2: 1 month 3: 3 months/school term 4: 6 months 5: 1 year 6: More than 1 year 7: Unlimited 8: Other	Delete questions 'PssDate1' and 'PssDate2' asking the start and finish dates of a travel season ticket, and replace with a single question. The code frame is from the National Travel Survey.
OthDate	"PLEASE SPECIFY.." : "Interviewer, enter number of days, weeks or months covered, or start and end dates"	If PssDate= Other then there is a follow up 'Text' question asking for details

PENSIONS

Following a review of the pensions section and some development work, the following changes have been agreed with the DSS. Some questions have been re-worded, one new question added, and there is a new Help screen.

EmpPens (re-wording)
"Thinking of your present job, do you currently belong to a company or occupational pension scheme run by your employer?"
NEW HELP SCREEN: A company or occupational pension may also be known as a 'superannuation' scheme

EpPres (re-wording)
"May I just check, have you ever belonged to a company or occupational pension scheme run by your present employer?"

*EpLong (re-wording; enter **year** only)*
"When did you join your present employer's pension scheme?
ENTER THE YEAR

EpType (code 1 re-worded)
"Which of the statements on this card best describes this scheme?"
-Contributions are taken out of your pay each week or month
-The scheme is called non-contributory but you do pay something to make additional provision for yourself or your dependents
-the scheme is non-contributory - no-one takes money off your pay each week or month

*KeepPen (**new question** for all respondents in present employer's pension schemes)*
"Now I have one final question about this pension scheme. If you were to leave your current job, could you still keep the pension and pay contributions into it, or would that not be possible?" :
Yes
No, not possible

Previous Employer Schemes
EpPrev (re-wording)
"Have you ever belonged to an occupational or company pension scheme run by a PREVIOUS EMPLOYER?"

*PPDat (enter the **year** only)*
"When did you start this pension?"
ENTER THE YEAR
IF MORE THAN ONE, GIVE DATE FOR 'MAIN PENSION'.

STATE BENEFITS RECEIVED

In response to interviewers' comments this section has undergone re-structuring. Now, when you interview a couple, you switch from one person to the other, question by question. For Person 1 the questions are worded as before, eg. *'Are you receiving any of these benefits...?'*. But Person 2 is just asked *"And [name], what about you?"* to reflect the new set up. We hope this change back to an earlier style of questioning will help the flow.

The old question Ben4Q has been **deleted** - it asked about receipt of Statutory Sick Pay and Statutory Maternity Pay, both of which are paid by an employer, not by the DSS. This makes them different from other social security benefits. On FRS we *also ask* about SSP & SMP in the Pay section. This duplication is unnecessary. So SSP and SMP remain in the Pay section only. **Maternity Allowance**, the other benefit to appear at Ben4Q, has been moved to Ben3Q.

For people on Income Support, a new question has been added. The DSS want to know more about the mechanics of *how* **child support** is received. Background: people on Income Support, whose ex-partner pays maintenance to the Child Support Agency, have two choices. They can (a) take the payment direct from CSA - and have their benefit reduced accordingly - or (b) get the DSS involved, by choosing to take the money *as part of benefit* (which may be more reliable). By adding a new question, respondents whose child support is *included* as part of Income Support can be recorded separately.

Questions	Wording	What has changed?
Maint	"Can I just check, does your Income Support include any payment from the Child Support Agency, for your child(ren)? : INTERVIEWER: ONLY INCLUDE IF PAID DIRECT TO C.S.A. (THIS MAY BE THROUGH A COURT ORDER, C.S.A. ASSESSMENT, OR WRITTEN MAINTENANCE AGREEMENT)"	New question to be asked of all respondents who receive Income Support and have dependent children in their benefit unit.

Minor Changes

Interviewers commented that sometimes the **order book** is held by someone else, for example, an elderly person living alone might give their order book to a son or daughter living nearby. So we have added another answer code at the question 'BookCard' which asks about an order book or other document: *"Held by a non-household member"*.

People receiving **Family Credit** (including as a lump sum) are asked if this included *'an allowance for child care expenses, such as a childminder or nursery'* ('CCDis', 'FLCCdis'). The rules have changed to include children up to age 13, rather than the previous 11. Also we have fixed a routing error and tightened up the

filter: the questions now appear only if a *registered* childminder/ nursery/ creche is used.

All respondents on Disability Living Allowance or Attendance Allowance are asked *"Whom do you receive it for?"* ('WhoRec') These benefits can be received personally, or on behalf of someone else. In theory this could include someone inside *and* another person outside the household, so we have removed the hard check which prevented this coding combination.

People who receive DLA Care component, or Attendance Allowance, are asked *"Does anyone get Invalid Care Allowance for looking after you?"* ('GetICA'). Previously, this question was only asked of people living alone (ie. it only came on route in single-adult households). We have changed this, so 'GetICA' will come up regardless of household type. The reason: someone in a multi-adult household *could* be cared for by a **non-household** member who gets ICA for looking after them.

Lone parents who make a *new* claim for **Child Benefit** after April are to be paid less than existing claimants. However, it's too tricky to amend the calculation of the soft check on CB. Instead, we added a sentence to the check:

"Are you sure? That's £xx a week. Child Benefit would normally be £xx or £xx for lone parents (UNLESS THE LONE PARENT'S CLAIM BEGAN AFTER APRIL 1998 - IF SO, SUPPRESS THIS CHECK). Please resolve or explain in a Note".

Question	Wording	What has changed?
Ben3Q & Ben3QFut	SOFT CHECK "Are you sure it's Maternity Allowance? Respondent is age 55 plus."	New soft check:
Ben3Q & Ben3QFut	HARD CHECK *"Men cannot receive Maternity Allowance"*.	New hard check
SFInc	"Just now you said you got £xx IS/JSA last time. Was that before or after taking off the repayment of the Social Fund loan?"	This question has been wrongly routed since 1995, but is now asked if 'RepayAmt' is either 'don't know' or '0'.
Ben7Q	"In the last 12 months (that is since DATE), have you received any payments from any of these insurance schemes?" *1: Unemployment/redundancy insurance..* etc…..	Due to an error last year, code 1 was not routed to the follow up questions. This has been amended *(now asked Pres, NumWeeks, Ben)*

Checks on Benefit (and NI) rates

The soft checks throughout this section, on Benefit rates, have updated to the new April 1998 figures. There will be a short period of time when you will still be entering the *old* rates for some people: so just suppress the check that this triggers. Rates for National Insurance have also been updated, to £6.35 (Class 2) and £6.25 (Class 3).

REDUNDANCY PAYMENTS

The routing has been tightened, so only employees who have been with their present employer for less than 12 months - or people currently not in work who have worked as employees in the last 12 months - are asked *"In the last 12 months have you received any redundancy payments?"* ('RedAny') and *"How much did you receive?"* ('RedAmt').

INCOME FROM PROPERTY

The questions on rent from property have been moved out of the household questionnaire. They now appear in the benefit unit at the question 'Royal', which also asks about income from royalties, income as a sleeping partner, etc. The new code has been put at the top of the list, as it is likely to be the most frequent amongst the sources of income listed.

1. *Rent from any property*
2. *Royalties, eg. from land, books, performances*
3. *Income as a sleeping partner in a business*
4. *An occupational pension from an overseas government or company, paid in foreign currency*
5. *None of these*

The follow-ups are as before, asking *"How much rent have you received…?"*

Householders who **sub-let** any of their *own* accommodation are asked, in the household questionnaire, how much rent they receive ('SubRent'). We have at added a check at 'Royal' to catch anyone who says 'yes', but is also a sub-letter. The check aims to prevent double-counting of the same rental income.

Minor Changes

Respondents may be receiving an income from more than one pension from a previous employer, trust or covenant, annuity, widow's employee pension, pension as a member of a Trade Union or friendly society *(AnyPen)*. Respondents can now give answers for more than one of them.

MAINTENANCE, ALLOWANCES AND OTHER SOURCES OF INCOME

If respondents have said at the earlier question (Maint) - in the Benefits section of the questionnaire - that they receive child maintenance payments included in their Income Support, some new text appears in the maintenance questions 'MntRec' and 'MntCt'. This is to prevent double counting:

*MntRec "Now, I'd like you to think about maintenance and separation allowances: **apart from the maintenance included in your Income Support,** are you RECEIVING any formal or informal money payments from a previous partner? (-either on behalf of yourself, or any CHILDREN)*

*MntCt "**Apart from the maintenance included in your Income Support,** do you have any sort of court order or Child Support Assessment, requiring a previous partner to make **ANY OTHER** money payments (whether you are actually receiving them or not)?"*

Note that 'MntCt' has been re-worded to reflect the fact that most child support is now arranged via a "child support assessment".

INCOME FROM ODD JOBS

Odd jobs, babysitting, and work as a mail order agent are now asked about in a single question with a showcard (previously there were two questions). The reference period is now 4 weeks, having been 12 months for odd jobs. The new question is (obviously) multi-codeable, and if you're interviewing a couple, it comes up for person 2 immediately after person 1. The program then asks any appropriate follow up questions of person 1, before moving on to person 2.

Also, the questions have been moved, to now follow, instead of precede, questions about income tax payments and NI contributions. This was done in response to interviewers' comments that people sometimes felt they were being 'checked' as to whether they had declared their income from odd jobs.

Question	Wording	What has changed?
OddJob	"During the last 4 weeks have you received any income from the kinds of work shown on this card which we have not yet covered?" 1. Babysitter 2. Mail Order Agent 3. Any odd jobs, occasional work or professional advice	Old questions now combined. Multi-codeable, with a showcard
OddJob	"And [name], what about you?"	For Adult 2, if there is one
BabPay	"How much did you earn in the last 4 weeks for babysitting?"	

MailPay	"How much did you earn in the last 4 weeks as a mail order agent?"	
MailNow	"Have you done this work in the last 7 days, since [date]?"	
OJTyp	*ODD JOBS/OCCASIONAL WORK:* "Have you done this work in the last 7 days, since [date]?" "IF RESPONDENT HAS MORE THAN 1 'ODD JOB' ANSWER FOR ONE JOB AT A TIME HERE"	A new interviewer instruction has been added here, and an introductory heading

INCOME TAX REFUNDS AND LUMP SUM N.I. CONTRIBUTIONS

The questions asking about any income tax refunds or lump sum national insurance contributions have been **deleted** (RefTax, RefAmt, RefPay, RefUe, NILump).

ACCOUNTS, SAVINGS AND INVESTMENTS

A code at the question *"Now I'd like to ask you about any accounts you may have with organisations like Banks or Building Societies…"* ('Accounts') has been amended. The aim is to cover *all* accounts, including any held with non-banking organisations, eg. the supermarkets:

*1: Current account with a bank or building society **or other organisation***

A new Help Screen have been added at questions asking whether the interest on various savings and investments was paid before or after tax ('AccIntr'):
"If more than one [account / investment] of this type held now or in the last 12 months, enter total interest/dividend for all of them"

Gilts

From April 1998, the Budget will change the rules regarding the interest received from Government gilt-edged stock. Interest on gilts *not* bought on the National Stock Register can now be received before tax; previously it was always *after* tax. The on-screen instruction has been changed to reflect this.

AccTax "Is the interest received AFTER or BEFORE tax?
INTERVIEWER: GOVT. GILTS BOUGHT VIA NATIONAL STOCK REGISTER ARE BEFORE TAX;
OTHERWISE THE INTEREST COULD BE BEFORE OR AFTER TAX. WAR LOAN IS
BEFORE TAX.

S.A.Y.E.

A soft check has been added at the question 'SayeDat' which asks *"In which month and year did you start the SAYE?"* The Department of National Savings called a halt on new SAYE arrangements in November 1994. The soft check springs if a later

date is entered: *"Are you sure? Save As You Earn ended in Nov 94 (although schemes starting before then are still valid). Please check with the respondent."*

Children's Bonus Bond

We used to have 2 hard checks here: if the value of Children's Bonus Bonds was not a multiple of 25; and if the total exceeded £1000. These constraints are correct for the *purchase* of Children's Bonus Bonds. But over the years, interest will be added, thereby allowing both of the 'rules' to be broken. So these checks have been deleted.

CHILDREN'S INCOME

Interviewers told us that where families have a lot of children, none of whom is earning an income, it is tiresome to keep asking for each child: *"Is [name of child] receiving any income or earnings from a spare-time job, or from a Trust?"* ('ChEarns') Now, where there is more than 1 child, a single new question asks if *any* of them have income from a job/ Trust. The drawback is that if the answer is 'yes', then we need to ask 'ChEarns' for each child individually. We would be interested to hear from interviewers if the new method is an improvement, or not.

Question	Wording	What has changed?
KidInc	*IF 1 CHILD* : Do not ask this question *IF 2 CHILDREN* : "Do either of your children *name* and *name* receive any income or earnings from either a spare time job or from a Trust?" : (Yes / No) *IF 3 OR MORE CHILDREN* : "Are any of your children *name*, *name*, *name*… [etc] receiving an income or earnings from a spare time job or a Trust?" (Yes / No)	New question
ChEarns	"INTERVIEWER: ASK OR CODE: Does [name] receive an income… "From a spare time job", "From a Trust", "From both a spare time job and a Trust" "Neither of these"	This question appears (as previously), for each child, but only if KidInc = yes. The wording has been amended

NON-RESPONSE QUESTIONNAIRE

Your Field Reports last year strongly highlighted the problems you had experienced on the doorstep, when attempting to administer the non-response questionnaire to people who had already refused to take part in the survey. Asking non-responders about any state benefits received, and their exact age, were singled out by interviewers as being particularly likely to create problems. Therefore the question asking about any state

benefits received has been deleted ('StateBen'). The age question ('AgeOfN') has now been banded.

ADMIN BLOCK

Some minor changes to do with multi-household addresses. In future, data from multi-households will be 'weighted' up, to reflect the fact that these households may have had less chance of being selected for the survey than single-household addresses. The two items needed for weighting are (a) the number of households found at the address; and if this is greater than '1', then (b) the number selected for interview (which may not be the same as the number actually interviewed, ie. due to nonresponse).

- SCPR interviewers only (in Scotland): the following question has been deleted:

  ScotSel SCOTTISH INTERVIEWERS: "Is this address covered on a pre-selection sheet?"

- Question as before, for everyone:

  NOFHH   "How many households did you find at this address?"

- **New question**, if more than one household was found:

  HHSel "And how many households did you SELECT for interview? (May not be the same as the number actually interviewed)"

As you know, the FRS rule is that a maximum of 3 households can be selected for interview. Some of them may later turn out to be unproductive, eg. non-contacts or refusals. But here we want you to enter the number *selected* - regardless of the subsequent outcome. (Range: 1-3).

ONS interviewers

will now complete the recall questions directly on the laptop, in a separate parallel block. Recall forms will no longer be used. See the Admin Block Instructions for further details.

HELP SCREENS

This year the questionnaire has a number of new Help screens, aimed at making the interviewer's job easier if the respondent should raise a query about a particular question. A few Help screens are described earlier in the appropriate context; the remaining new or amended ones are shown below. Some of the screens are 'harmonised' - they exist on other major government surveys, and so are now included in FRS in an effort to ensure comparable information.

Question	Help Screen	What has changed?
MarStat *Household Grid*	"The aim is to obtain legal marital status, irrespective of any de facto arrangement. The only qualification to this aim is that you should not probe the answer 'separated'. Should a respondent query the term, explain that it covers any person whose spouse is living elsewhere because estrangement (whether the separation is legal or not). Ignore temporary absences, e.g. on oil rig. A person whose spouse has been working away from home for over 6 months, e.g. on a contract oversea or in the armed forces, should still be coded as married and living with husband/wife if the separation is not permanent."	New Harmonised Help screen
Lender *Mortgage Questions*	"Recently, the following main building societies have become public limited companies, and so should now be coded as banks: Abbey National plc Alliance & Leicester plc Cheltenham & Gloucester plc Halifax plc Woolwich plc	New Help screen
MortFlex *Mortgage Questions*	"A flexible mortgage allows the borrower to make certain changes to their mortgage payments without having to re-negotiate with their lender. Examples include varying the amount of payments, taking breaks from payments in certain circumstances (e.g new baby), or having one or two months without payments which they can take when they like during the year (this is <u>not</u> the same as a mortgage with a 'fixed' break in December and/or summer, as this is set by the lender). Some flexible mortgages operate like a current account.	New Help screen to explain the characteristics of a 'Flexible Mortgage'
PolAmt *Insurance Policies*	"If the premium is paid by both the person insured and someone else, enter the part paid by the respondent only".	
NeedPer *Care given & received*	"If they provide help for **MORE THAN ONE** OF : 15: parent outside the household 16: child outside the household 17: relative 19: friend/neighbour 20: client of a voluntary organisation 21: other non-household member please make a note here (Ctrl + M) to tell us how many **more** people they help.	New Help screen so that additional cases can be monitored with a view to taking further action next year.
IncDur *Health*	"Even if they have occasionally returned to work AFTER becoming injured ill or disabled, code the FIRST time they stopped work for this	New Help screen

	reason. DSS statisticians need to know which year, in order to help with future forecasting of the 'Transitional Protection' of benefits related to incapacity."	
TopUpL *Student Loans*	"Student loans are repaid once the borrower starts earning, and they have their interest rates in line with the RPI which means that in real terms students pay back no more than they borrow. They are offered by the Student Loans Company and by some private financial institutions."	New Help screen
JobAway *Employment Status*	"Only code YES if there is definitely a job to return to, **for example on holiday, off sick, maternity leave, laid off, career break.** Take the respondent's definition of whether they are in paid work or not. If they are unsure: a job exists if there is a definite arrangement between an employer and an employee for work on a regular basis, whether work is full or part time. Long term absence from work, except career breaks: if total absence exceeds 6 months, a person has a job only if full or partial pay has been received during their absence and they expect to return to same employer. Career breaks - as above except pay not necessary. Seasonal workers 'between seasons' (ie not currently working) should be coded 2. (Note, the odd week of sick leave during the working season should be treated the same as in other work, and coded 1.) Casual workers - code No even if expect to work for employer again in future."	New Harmonised Help screen. Note: the item in bold isn't from harmonisation, but was agreed to be important in view of questionnaire changes elsewhere to Statutory Sick and Maternity Pay questions.
Unpaid1 *Availability for work*	"The people we expect to answer Yes here are those whose work contributes directly to a business, farm, or professional practise that they own, but who receive no pay or profits. EXCLUDE unpaid voluntary work done for charity etc."	New Harmonised Help screen
Unpaid2 *Availability for work*	"The people we expect to answer Yes here are those whose work contributes directly to a business, farm, or professional practise OWNED BY A RELATIVE, but who receive no pay or profits (eg. a wife doing her husband's accounts or helping with family business) EXCLUDE unpaid voluntary work done for charity etc."	New Harmonised Help screen
Look *Availability for work*	"'Looked for paid work' may cover a wide range of activities and you should NOT try to interpret the phrase for the respondent. Looking in the paper for vacancies is an active form of search. Looking for work on government scheme requires an approach to the agency."	New Harmonised Help screen
OthDed *Employee Pay Details*	"Although people in the public sector (e.g. some civil servants, teachers etc.) have a non-contributory pension scheme, some choose to pay contributions to provide an extra pension for their widow or dependents. If so, you should include this as a 'pension contribution'.	New Help screen
EmpPens *Pensions*	"A company or occupational pension may also be known as a 'superannuation' pension"	New Help screen
PerPen *Pensions*	"Only include pensions if contributions are being paid in now, or will be paid in future, otherwise if **no further contributions will be made,** treat as a previous personal pension".	A frozen personal pension plan is a 'previous' pension.

APPENDIX: SHOW CARD AMENDMENTS

WHICH CARD?	AMENDMENT (in bold)	NEW CARD
A ('Ethgrp')	AMEND SHOW CARD:- 1. White 2. Black - Caribbean 3. Black - African 4. Black - **Other Black Groups** 5. Indian **6.** Pakistani **7.** Bangladeshi **8.** Chinese	***A***
B ('Tenure')	KEEP	B
C ('OthWay')	KEEP	C
D ('SerIncW', 'SerInc')	AMEND SHOW CARD:- **Heating** **Lighting** **Hot water** **Fuel for cooking** **TV licence fees**	***D***
E ('OthMort2', 'RMPur', 'OthPur', 'OthPur3'))	KEEP	E
F ('CTBand')	KEEP	F
G ('CTDisc')	AMEND SHOW CARD LAYOUT:- **25% OR 50% STATUS DISCOUNT BECAUSE:** **..There is only one adult living here** **..This household includes:** **a severely mentally impaired person** **a person aged 18 or over who is still in school** **a student** **student nurses** **apprentices** **YT trainees** **care workers**	***G***
H ('Charge')	KEEP	H
I ('Contrib', 'SharePay')	KEEP	I
J ('PropRent')	MOVE TO COME AFTER SHOW CARD HH NEW CARD HERE:- **CARD J** **THIS CARD IS NOT IN USE**	***J***
K ('Premium', 'NumPols', 'PolMore')	Add heading to top of card:- **"Insurance cover (including cover provided by an employer, or a pension plan)"**	***K***
L ('UseVcl')	KEEP	L

M ('VehPrice')	REMOVE THIS SHOW CARD (VEHICLE PRICE WHEN NEW) AND REPLACE WITH:- **CARD M** **THIS CARD IS NOT IN USE**	***M***
N (NeedHelp, GiveHelp, NeedTask)	KEEP	N
O (Rstrct)	KEEP	0
P (Train)	AMEND SHOW CARD:- 1. Youth Training (YT) 2: Training for Work (TfW) 3: Work Trial 4: Project Work 5: Career Development Loans/Youth Credits 6: **New Deal for 18-24 year olds** 7: Any other training scheme	***P***
Q (Etype)	KEEP	Q
R (InclPay, InclPay1)	KEEP	R
S (HHInc)	KEEP	S
T (InKind)	AMEND SHOW CARD: Luncheon Vouchers Free meals (including free canteen at work) Free or subsidised goods **(incl. store vouchers)** **Childcare provisions and/or childcare vouchers** Free or subsidised medical insurance for self or family Shares or share options Payment of school fees for family members **Provision of a phone for personal use as well as work** **Any other benefits in kind**	***T***
U ('OwnSum')	KEEP	U
V ('EpRights', 'EpPrRgts'))	KEEP	V
W ('EpType')	AMEND SHOW CARD:- 1. **Contributions are taken out of my pay each week or month** 2. The scheme is called non-contributory, but you do pay something to make additional provision for yourself or your dependants 3. The scheme is non-contributory - noone takes money off your pay each week or month	***W***
X ('PPType')	KEEP	X
Y ('PPOut')	KEEP	Y
Z ('BenQ1')	KEEP	Z
AA ('Ben2Q', 'Ben2QFut')	KEEP	AA
BB ('Ben3Q', 'Ben3QFut')	AMEND SHOW CARD: Jobseekers Allowance (Unemployment Benefit) Income Support Family Credit Incapacity Benefit (Invalidity or Sickness Benefit)	***BB***

	Maternity Allowance Industrial Injuries Disablement Benefit	
CC (Ben4Q; Ben4QFut)	**REPLACE SHOW CARD CC** (Ben4Q, Ben4QFut now deleted) : REPLACE WITH:- **SHOW CARD CC THIS CARD IS NOT IN USE**	***CC***
DD ('Ben5Q')	KEEP	DD
EE (DSSPay)	KEEP	EE
FF (Ben7Q)	KEEP	FF
GG (AnyPen)	KEEP	GG
HH (Royal)	AMEND SHOW CARD: 1. **Rent from any property** 2. Royalties, eg. from land, books, performances 3. Income as a sleeping partner in a business 4. An occupational pension from an overseas government or company, paid in foreign currency 5. None of these	***HH***
J (PropRent)	*If you code 1 at 'Royal', the follow up question 'PropRent' uses OLD show card J* **OLD CARD J MOVED HERE AND RENAMED II**	***II***
II (Allow)	KEEP	***JJ***
New card at 'OddJob'	NEW SHOW CARD: **CARD KK** 1. **Babysitter** 2. **Mail order agent** 3. **Odd job, occasional work or professional advice**	***KK***
JJ (Accounts)	AMEND SHOW CARD: 1. Current account with a bank or building society **or other organisation** 2. National Savings Bank (Post Office) - Ordinary account 3. - Investment Account 4. TESSA (Tax-Exempt Special Savings Accounts) 5. Savings account, investment account/bond, any other account with a bank, building society **or other organisation** 6. None of these	***LL***
KK ('Invests')	KEEP	***MM***
LL ('OtInvA')	KEEP	***NN***
MM ('ChInc')	KEEP	***OO***
NN ('OtInvC')	KEEP	***PP***
OO ('TotSav')	KEEP	***QQ***
PP ('IncChnge')	KEEP	***RR***
QQ ('NSAmt')	KEEP	***SS***

INFORMATION FOR EDITORS AND ANALYSTS

The edit variable *'CombAmt'* only allowed you to code amounts in ££s. This has been amended so that pence can also be recorded.

"EDITOR: BENEFIT AMOUNTS ARE 'DK' BECAUSE COMBINED. IF UNABLE TO SEPARATE, ENTER TOTAL HERE (standardise to weekly amount if possible)" :
0.01..99999.00

Derived weight for multi-households. We have created a variable called <u>HHMultiW</u> which contains the required weight, using this instruction:

>   Set HHMultiW to equal '1' for all households;
>   IF HHSel >0, THEN compute HHMultiW = NOFHH / HHSel

New 'slot' for ExBenAmt. In v34, ExBenAmt is an Array question with 2 occurrences. DSS analysts have requested an extra 'slot' here, to keep HB, CTB, and "DK/both" in 3 distinct places. This has been done for v35:

>   ExBenAmt[1] just for HB
>   ExBenAmt[2] just for CTB (as v34)
>   ExBenAmt[3] for 'both' and 'DK'

New derived variable for 'Age'.   In the household grid, there's a new variable called DVAGE. It's set to the contents of the existing variable 'AgeOf', for each person in the household. Note: the DV is a requirement following the introduction of the 'date of birth' question under harmonisation. However, for adults over 20 years, FRS continues to ask age, rather than DoB

New derived variable DVJb12ML, a DV for anyone unemployed/ inactive but has worked in last 12 months. Categories:
>   Jb12ML "Worked in last 12 months",
>   NoJb12ML "NOT worked in last 12 months"

This is derived this is from our existing derived variable 'Work12m'.

Two new derived variables are specified under harmonisation.

 DVILO3a   "DV for ILO in employment - 3 categories"
>   : (InEmp,

        Unemp,
        EcInAct

  DVILO4a   "DV for ILO in employment - 4 categories"
            : (InEmpXuf,
              UFW,
              Unemp,
              EcInAct

These are derived in the v35 FRS code as follows:

```
IF (Working = Yes) OR (JobAway = Yes) OR
      (Train = Yes) OR (Unpaid1 = Yes) OR (Unpaid2 = Yes) THEN
      DVILO3a := InEmp
      IF (Unpaid1 = Yes) OR (Unpaid2 = Yes) THEN
        DVILO4a := UFW
      ELSE
        DVILO4a := InEmpXuf
      ENDIF
    ELSEIF Start = Yes THEN
      DVILO3a := Unemp
      DVILO4a := Unemp
    ELSE
      DVILO3a := EcInAct
      DVILO4a := EcInAct
    ENDIF
```