

# **Family Resources Survey (FRS)**

**April 2013 – March 2014**

**Guide to Question Changes**

***March 2013***

## Contents

<b>SUMMARY</b> .....	<b>3</b>
NOTE ON THE GUIDE TO CHANGES.....	3
<b>HOUSEHOLD SCHEDULE</b> .....	<b>4</b>
RELATIONSHIP (HOUSEHOLD GRID).....	4
FULL-TIME EDUCATION (HOUSEHOLD GRID).....	5
NUMBER OF HOURS IN SCHOOL (HOUSEHOLD GRID) .....	5
WHERE IS SPOUSE (HOUSEHOLD GRID) .....	6
NATIONAL IDENTITY AND ETHNICITY .....	6
TENURE (TENURE AND ADDRESS INFORMATION) .....	7
ACCOMMODATION AND LOCAL SERVICES (TENURE AND ADDRESS INFORMATION).....	7
SHELTERED ACCOMMODATION (TENURE AND ADDRESS INFORMATION) .....	9
RENTED ACCOMMODATION.....	10
OWNED ACCOMMODATION AND MORTGAGES .....	11
COUNCIL TAX .....	12
WATER AND SEWERAGE CHARGES .....	14
RENT WITHIN CONVENTIONAL HOUSEHOLDS.....	14
RENT WITHIN SHARED HOUSEHOLDS .....	14
<b>BENEFIT UNIT SCHEDULE</b> .....	<b>15</b>
HEALTH AND ABILITY TO WORK .....	16
ACCESS TO MEDICAL AND DENTAL CARE .....	18
EDUCATION AND AWARDS .....	18
EMPLOYMENT STATUS .....	19
EMPLOYEE PAY DETAILS .....	23
PENSION SCHEMES.....	23
BENEFITS.....	25
INCOME FROM PENSIONS, TRUST, ROYALTIES AND ALLOWANCES .....	51
ADULT AND CHILD SOCIAL MATERIAL DEPRIVATION .....	51
ADULTS' SAVING AND INVESTMENTS .....	56
WELL-BEING.....	57
<b>DETAILS OF CHANGES TO SHOW CARDS</b> .....	<b>63</b>

## Summary

This booklet describes the main changes made to the FRS questionnaire for the new survey year.

While many of these changes have been made to meet the information needs of policy makers, for example, to reflect changes in benefit recipient rules, amendments have also been made in response to interviewer feedback – made via the Field Report, mid-year through telephone calls and e-mails to researchers, and during briefings.

Further to this, there have been some major amendments to the 2013-14 questionnaire as a result of the 2011-12 review of the FRS benefits section. The suggestions that emerged from the benefit review were taken forward into a pilot, which was carried out towards the end of 2012. As a result of this work the benefits block has been substantially restructured.




There are also a number of significant changes linked to the collection of EU-SILC data through the FRS. Every year a whole module of EU-SILC questions is removed and replaced by another – this year we're going to be looking at well-being and losing the accommodation and local area questions.

## Note on the Guide to Changes





As a quick visual guide to the type of change made, icons have been included throughout this document.

### Key of icons

Changes made to questions will be identified by the following icons:

Icon	Description
	Removed
	Added
	Changed

The icons below have been added to the Guide to Changes for extra clarification.


Icon	Description
	Important: Please Note
	Check with respondent
	Include this information in the answers recorded
	Exclude this information from the answers recorded

***Thank you to all the interviewers who worked on the 2012-13 FRS. We hope you continue to enjoy working on the survey.***

## Household Schedule

### Relationship (household grid)

A new note has been added to the relationships question, asking interviewers to code the family members of cohabiting same sex partners in the same way as those in a civil partnership.

Changed: 

R

#### ASK OR CODE [NAME]'S RELATIONSHIP TO [NAME] (enter code)

- |   |                                     |
|---|-------------------------------------|
| 1. spouse   | 10. father/mother-in-law            |
| 2. cohabite                                       | 11. brother/ sister (incl. adopted) |
| 3. son/ daughter (incl. adopted /legal dependent) | 12. step-brother/sister             |
| 4. step-son/ daughter                             | 13. foster brother/sister           |
| 5. foster child                                   | 14. brother/ sister-in-law          |
| 6. son-in-law/daughter-in-law                     | 15. grand-son/daughter              |
| 7. father/mother/or guardian                      | 16. grand-father/mother             |
| 8. step father/mother                             | 17. other relative                  |
| 9. foster parent                                  | 18. other non-relative              |
|   | 20. Civil Partner                   |
|   | 97. (THIS CODE NOT USED)            |

The relationship to parents of partner in a civil-partnership should be recorded as 'mother-in-law' and 'father-in-law', in the same way as relationships for married couples. Previously, the parents of a civil partner had been coded as 'no relation' to the other partner.

#### Question Information for Relationship

You may want to introduce this section. A possible introduction is: "There are a lot of changes taking place in the make-up of households/families and this section is to help find out what these changes are. I'd like you to tell me the relationship of each member of the household to every other member."

The section must be asked for all households consisting of more than one person. Please **ask** in every case. You should **not make assumptions** about any relationship.

You should probe on this question, but be sensitive. It may be that someone described as a 'son' or 'brother' earlier is actually a stepson or half-brother. Where possible, we want to know the true relationship. If you have doubts about any relationship, record as much information as possible to allow changes to coding later if appropriate. Half-brothers/sisters should be coded with step-brothers/sisters.

Treat relatives of cohabiting members of the household as though the cohabiting couple were married. That is the mother of a partner is coded as mother-in-law. Other relatives include cousins, nieces, nephews, aunts and uncles. *Treat relatives of same sex cohabiting members of the household as though the cohabiting couple were in a civil partnership.*

The list of codes actually shown on the laptop will vary according to the person's sex, e.g. code 7 will be either 'father' or 'mother'.

On FRS the primary purpose is to give the computer enough information to work out who belongs together in Benefit Units, so it is extremely important to enter the right code each time. See instructions at Show Benefit Unit for Benefit Unit (BU) definition.

The FRS records same sex couples as being in the same Benefit Unit.

The FRS is not expecting to identify many same sex Civil Partnerships or same sex couples living together. There is a soft check if two people of the same sex are coded as cohabiting, in case of keying errors.

### Full-time education (household grid)

A new note has been added to the question **FTEd** as a reminder that the participation age will be increasing this year. From 2013 young people in England must continue in education or training until the end of the academic year in which they turn 17, and from 2015 until 18.



? FTEd

Is [name] currently in full-time education?

**INTERVIEWER:** INCLUDE CORRESPONDENCE COURSES AND OPEN LEARNING AS WELL AS OTHER FORMS OF FULL-TIME COURSES.

*From 2013 all young people in England must continue in education or training until the end of the academic year in which they turn 17 and until their 18th birthday from 2015*

This question is asked of all who are over 3 and under 75. Any respondent who is registered as a full-time student at an educational establishment should be coded 1 ('Yes') at this question. If registered part-time code 2 ('No') here.

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

### Number of hours in school (household grid)

A new note has been added to the question **HrsEd**, asking that responses be rounded up or down to the nearest whole number.



? HrsEd

And how many hours per day does [name] usually attend school?

**INTERVIEWER:** Break times should be included if within the school grounds and supervised. If attends school infrequently or part days, use last day attended 0 can be a valid answer at this question.

**INTERVIEWER:** *Please round any part hours given by respondents up or down to the nearest whole hour. For example, 6.5 hours will be rounded up to 7 and 6.4 hours rounded down to 6.*  
: 0..12

## Where is spouse (household grid)

SpOut and its answer categories have been extended to include civil partnerships.

Changed 

### ? Where is Spouse

↔ SpOut

**INTERVIEWER:** You've recorded [name] as 'Married & living with spouse/*in a Civil Partnership*', but without a spouse/partner in the household.

PLEASE CHECK THIS. If spouse/partner is away for six months or more, press 1 and enter to continue.

BUT IF NOT (e.g. if separated), ENTER 2 AND AMEND HOUSEHOLD GRID.

1. Married/*Civil Partnership* spouse/partner not in household
2. Other – AMEND HOUSEHOLD GRID

## National identity and ethnicity


The answer categories for country of origin have been updated so they better reflect the composition of the UK population, as well as those used in other surveys.

Changed 

### ? COrign

**In which country were you born?**

1. England
2. Wales
3. Scotland
4. Nireland "Northern Ireland"
5. UK "UK, Britain"
6. ROI "Republic of Ireland"
7. *India*
8. *Pakistan*
9. *Poland*
10. *Other*

Changed 


routing change - *If COrign=10 'Other'*

### ? Other Country of Origin

↔ COrignOS

**Type in the country**

**Type in at least the first 3 characters of the country's name**

Changed 


routing change - *if COrign = 6, 7, 8, 9, 10*

### ? Year arrived

↔ CameYr

**In which year did you first arrive in this country?**

**INTERVIEWER:** Enter in 4 digit format e.g. 2000

Changed 

routing change - *If COrign = 6, 7, 8, 9, 10 and ContUK=2*

### ? Last arrived

↔ CameYr2

**Which year did [name] last arrive in this country?**

Enter in 4 digit format e.g. 2000

## Tenure (tenure and address information)

A number of changes have been made to housing benefit questions this year, both as a result of changes in the way they're administered and with the introduction of Universal Credit. For the most part changes involve the movement of HB questions to the benefit block, and a name change from Housing Benefit to 'benefits to help with rent' (local authorities now administer HBs and have control to rename them and change their eligibility criteria).



If **Tenure** = 5 – *rent-free accommodation*

☞ Soft check

**Can I just check do you live rent free because all of your rent is paid through *state benefits*?**

**INTERVIEWER:** IF YES recode Tenure to Code 4 (Rent it).

PLEASE CHECK THEIR RENT/MORTGAGE IS NOT PAID BY BENEFITS. ONLY ACCOMMODATION PROVIDED BY SOMEONE ELSE (EMPLOYER, RELATIVE, ETC) IS 'RENT-FREE'.

## Accommodation and local services (tenure and address information)

Questions added to the 2012-13 questionnaire about accommodation and local services have been removed this year. These questions formed an 'ad-hoc' accommodation module that is only included in the EU-SILC every few years. In 2013-14 they are replaced by questions on well-being (listed at the end of this document). The EU-SILC accommodation questions that have been removed this year are:



### **Intro**

The next questions ask about your household's accommodation, living conditions, access to services and whether the household is likely to stay in the accommodation.

### **Short**

Do you have sufficient space for your household's needs?

### **MCV\_2**

Do you know the approximate size of your accommodation in square metres?

### **MCV\_3**

What is the approximate size of your accommodation in square metres?

### **MCV\_4**

Do you know the approximate size of your accommodation in square feet?

### **MCV\_5**

What is the approximate size of your accommodation in square feet?

### **EleIn1**

Does your household's accommodation have a sufficient number of electrical sockets and light fittings?

**Elecln2**

Are the sockets, lights and other fixed electrical equipment in your accommodation in safe working order?

**PlumIn1**

Does your accommodation have a sufficient number of sinks, baths, showers and toilets?

**PlumIn1b**

Does your accommodation have sufficient plumbing for appliances, such as a washing machine?

**PlumIn2**

Are the plumbing and drains in your accommodation in safe working order?

**HeatFa1**

Is your accommodation centrally heated with radiators in most rooms?

**HeatFa2**

(Can I just ask) does your accommodation have fireplaces, log burners, stoves, fixed electric or gas heaters, or any other type of fixed heater?

**HeatFa3**

Do you have any heating at all in your accommodation?

**ComWa**

Can you keep comfortably warm in your accommodation during winter time?

**ComCo**

Can you keep comfortably cool in your accommodation during the summer time?

**OvSat**

In general, how satisfied or dissatisfied are you with your household's accommodation?

**IntroServ**

The next questions ask about how easy or difficult it is for your household to access groceries and services, either physically or ordering by telephone or over the internet.

**GrocSe**

How easy or difficult is it for your household to get groceries which meet your daily needs?

**Bankse**

How easy or difficult is it for your household to access banking services?

**PostSe**

How easy or difficult is it for your household to access postal services?

**Pubtr**

How easy or difficult is it for members of your household to use public transport?



**PrimH**

How easy or difficult is it for members of your household to get to a GP, health centre or Accident and Emergency department?

**Samesc**

May I check, do the children in your household all go to the same school?

**School**

If no: thinking about the school that is the most difficult to get to...

**CompSc**

How easy or difficult is it for the child in your household to get to (this) school?

**CompSc1**

SHOW CARD B1B

How easy or difficult is it for the children in your household to get to school?

**Move1**

Do you think your household may move in the next six months?

**Move2**

Is your household choosing to move or being forced to move?

**MoveReas**

SHOW CARD B1C

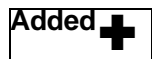
What is the main reason for being forced to move in the next 6 months?

<b>Sheltered accommodation (tenure and address information)</b>
---

Some small changes have been made to questions about sheltered accommodation in order to capture cases where a respondent's landlord is providing them with care.

**YrLvChk**

Can I just check - did you move to this address on or after 7<sup>th</sup> April 2008?



If Shelter = Yes

**LldCare**

*Does your landlord, or someone acting on their behalf, provide you with more than a minimum level of regular care, support or supervision?*

1. Yes
2. No

**INTERVIEWER:** *This does not include a warden or emergency call-out service which is only available to provide help in emergencies, or general property management*

## Rented accommodation

As with Tenure (above), a number of questions connected to Housing Benefit have been subject to wording changes this year. Some have also been amended in response to feedback from interviewers in an effort to make them clearer for respondents.

Changed: 

### ? Rent Documents

↔ RentDoc

**Do you have a rent book, rent card, benefit statement or some other rent document that you could consult?**

**IF BENEFIT STATEMENT OR RENT BOOK AVAILABLE PLEASE CONSULT THIS.**

1. *Benefit statement*
2. Rent card / book
3. Some other document
4. None

Changed: 

### ? Housing benefit check

↔ HBenChk

***Can I just check, is the amount of [£amount] for rent that you mentioned earlier, BEFORE taking off the state benefits to help with rent (that is the total amount paid to your landlord)? Or is it AFTER taking off state benefits to help with rent (that is the reduced amount)?***

1. Before
2. After

Changed: 

### ? Eligible Amount

↔ EligAmt

**On the (rent book/ card/ statement), what is the amount shown for ELIGIBLE RENT?**

**INTERVIEWER:** *Eligible rent is the total rent amount minus any extra charges included with it. It is the rent figure local authorities use when making benefit calculations.*

*The figure given for eligible rent will either be the same as the total amount paid in benefits to help with rent, or will be higher. It cannot be less than the total amount paid in benefits to help with rent.*

#### Question Information for Eligible Amount

*This question is only asked if a benefit statement is being referred to. Benefits paid to help with rent do not pay for services included in the rent. Service charges are taken off the total amount paid (the gross rent) leaving the 'eligible' amount. For example, if a respondent's gross rent is £415, and £15 of that is for service charges, the eligible rent will be £400.*

### ? Water and Sewerage Included

↔ **WSInc**

**Were water or sewerage charges (rates) included in the rent which you mentioned? [PLEASE CONSULT THE DOCUMENT]**

1. Both water and sewerage
2. Water only
3. Sewerage only
4. Neither

Note: This question will only appear for renters in England and Wales. Include charges for emptying septic tanks in sewerage charges.

➡ Question Information for Water and Sewerage Included

All renters are asked questions about water/sewerage (except in Scotland where this is collected as part of council tax) and other charges included in the last rent. *Please refer to a rent book or benefit statement wherever possible, as this is typically under-reported.*

Changed 

**? Anyone Outside of Household Pay for Accommodation**

↔ **AccNonHH**

**(Apart from state benefits to help with rent) does anyone outside your household pay any rent on this accommodation on your behalf?**

**INTERVIEWER: EXCLUDE Housing Benefit - i.e. RENT REBATE or RENT ALLOWANCE**

Changed 

**? Who Pays for Accommodation**

↔ **AccPay**

**Who is that? CODE ALL THAT APPLY**

1. DWP
2. Employer
3. Other organisation
4. Friend/relative
5. Other

*If you enter that the DWP are paying towards rent a soft check appears to clarify that the only payments we expect here are those to cover arrears.*

☞ Soft Check

Are you sure? DWP only ever pay **arrears** of rent. Double-check, that respondent is not thinking of *state benefits to help with rent*. If genuine arrears, suppress this warning.

**Owned accommodation and mortgages**

To add a new interviewer prompt has been added at **OutsMort**.

Changed 

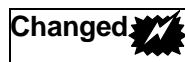
**? Payment Outside**

↔ **OutsMort**

**Does anyone from outside the household pay anything towards THIS mortgage/loan on your behalf, on a regular basis? This includes payments by organisations such as DWP.**

## Council Tax

There has been a major change to the way Council Tax Benefits operate. They are now administered by local authorities, who are able to set their own eligibility criteria (this may or may not be based on household income). They may also be known as something than council tax benefits, with different names applying to the same types of benefit in different parts of the UK. Therefore, this year's FRS refers to a council tax reduction – the new wording replacing all former references to Council Tax Benefit. Descriptions and help screen information has also been updated in line with policy reforms.



### ? Council Tax Amount

↔ CTAmt

#### / Question Information

The payment entered should be the last council tax payment made by the household. However, the question is with reference to the respondent's *current* status, so for example if they are in receipt of 100% council tax reduction (*which has replaced Council Tax Benefit*) or for some other reason are non-payers, enter 0, not the amount of the last payment when they were making payments. If no payment for (survey year) has yet been made, accept the last payment from (survey year-1) even if the new bill is to hand.

If the respondent has not paid council tax for any reason, enter 0 and the later questions will probe the reasons (except in Scotland - see below).

The owner of the residence of a minister of religion will be liable except in the case of the Church of England where the Church will be liable. Church of England stipends will be reduced to reflect all or part of the council tax payment, and the pay of ministers of other religions may also be docked to cover the tax. These payments should be accepted as *council tax payments*.

#### Domestic Water Charge and Domestic Sewerage Charge in Scotland.

In Scotland, the question includes the phrase **including domestic water charge and domestic sewerage charges**. These charges should be included in this figure. On bills the total annual amount payable for all three components may be identified as the 'net amount payable' (which may then be divided into instalments).

Council Tax *reduction (which has replaced Council Tax Benefit)* is not applicable to domestic water or sewerage charges, and therefore every household eligible for council tax should pay them. If the household is allowed 100% Council Tax *reduction (which has replaced Council Tax Benefit)*, the amount paid for water and sewerage charges should be entered at **Council Tax Amount** (either the annual net amount if paid in full, or the last instalment payment). For this reason a soft check is triggered if zero is entered at this question.

#### If the amount is changing/has changed following an appeal.

Enter the amount last paid and then open a note using <Ctrl+M> to give details of the previous/future amount for instalments and, if possible, how much has been paid in total so far or how much is due to be paid for the rest of the financial year. This information should be on the relevant bills.

If an amount is entered:

Changed: 


? Council Tax Annual Amount

↔ CTAnnual

REFER TO DOCUMENT BEING CONSULTED.

On the statement/bill, what is the total amount payable for the year, [including Domestic Water and Sewerage Charges but] after deducting any discounts or *reduction (which has replaced Council Tax Benefit)*?

'YEAR' = APRIL TO MARCH (12 MONTHS)

Changed: 

? Council Tax Rebate

↔ CTReb


*Do you receive a Council Tax reduction from your Local Authority (which has replaced Council Tax Benefit), to help pay your Council Tax?*

**INTERVIEWER:** Local Authorities and Devolved Administrations offer schemes reducing the council tax liability of some people, which may offer support to some on low incomes

Be careful that the respondent does not confuse Council Tax *reduction (which has replaced Council Tax Benefit)* with status discount (see below). It is possible that both will apply (e.g. when the household consists of a single person on a low income).

In Scotland, benefit is not allowed in connection with Domestic Water Charge and Domestic Sewerage Charge.

If the respondent earlier claimed they were *getting benefits to help with their rent*, or that DWP were contributing to their mortgage.

Changed: 


? Council Tax Rebate Amount

↔ CTRebAmt

How much was allowed?

☞ Soft Check

Zero amount of Council Tax reduction: this contradicts previous answer (at 'CTReb') that a reduction WAS received. Please resolve if possible.

Changed: 

? Council Tax Rebate Period

↔ CTRebPd

How long did this cover?

Enter details of any benefit in connection with the last council tax payment made.

☞ Question Information for Council Tax Rebate Period

If an appeal is pending:

Enter the amount that applied to the last payment.

If an appeal has been made and a new bill has been received:

Enter details of the most recent payment and if this is about to change following receipt of the new bill then open a note using <Ctrl+M> to record the future figures.

If the respondent knows how much reduction will be allowed for the whole financial year or part of it, it is acceptable to record this total figure together with the appropriate period code.

Changed 

### ? Waiting for Council Tax Rebate/Benefit

↔ CTBWait

Are you awaiting the outcome of an application for Council Tax reduction?

*INTERVIEWER: Council tax reduction has replaced Council Tax Benefit.*

Changed 

### ? Council Tax Discount

↔ CTDisc

SHOW CARD B12

[In addition to your *reduction* / Are] you allowed a discount of 25% or 50% in relation to your Council Tax, for any of the reasons shown on this card?

If the respondent said earlier that they were in receipt of Council Tax Benefit, the textfill 'In addition to your *reduction*' applies.

## Water and sewerage charges

Added 

A new soft check has been added at **SewerPay**

If WaterPay = No and SewerPay = No then:

Soft Check

*INTERVIEWER: It is quite unusual not to pay water or sewerage rates, please check.*

## Rent within conventional households

There has been a small wording change at **CvPay**, in response to changes to the housing benefit system.

Changed 

### ? Amount for Board and Lodging

↔ CvPay

*How much rent did [name] pay [for board and lodging] last time it was due, after deducting any state benefits to help with rent?*

## Rent within shared households

Changed 


### ? Shared Rent Amount

↔ SrentAmt

*How much rent did [name] pay last time it was due, after deducting any state benefits to help with rent?*

## BENEFIT UNIT SCHEDULE

Questions about proxy respondents have been moved from the end of the questionnaire to the beginning of the benefit unit schedule. A new question has also been added to collect information about those answering questions for 16-19 year old household members.


Changed 

### ? Personal or Proxy

↔ **PProx**

**INTERVIEWER:** IS THE INTERVIEW WITH [NAME] A PERSONAL INTERVIEW OR A PROXY INTERVIEW?

1. Personal
2. Proxy

Changed 

### ? Proxy for adult

↔ **PPPer**

Code person no. of respondent who answered on behalf of ^names[lpno].

Code one person only

These are the household members:

- (1) ^DMNAME[1]
  - (2) ^DMNAME[2]
  - (3) ^DMNAME[3]
  - (4) ^DMNAME[4]
  - (5) ^DMNAME[5]
  - (6) ^DMNAME[6]
  - (7) ^DMNAME[7]
  - (8) ^DMNAME[8]
  - (9) ^DMNAME[9]
  - (10) ^DMNAME[10]
  - (11) ^DMNAME[11]
  - (12) ^DMNAME[12]
  - (13) ^DMNAME[13]
  - (14) ^DMNAME[14]
  - (15) ^DMNAME[15]
  - (97) "Someone else"
- : 1..97

Added 

### ? Proxy for 16-19

↔ **Prox1619**

Code person no. of respondent who answered on behalf of ^names[lpno].

Code one person only

These are the household members:

- (1) ^DMNAME[1]
- (2) ^DMNAME[2]
- (3) ^DMNAME[3]
- (4) ^DMNAME[4]
- (5) ^DMNAME[5]
- (6) ^DMNAME[6]
- (7) ^DMNAME[7]
- (8) ^DMNAME[8]
- (9) ^DMNAME[9]
- (10) ^DMNAME[10]
- (11) ^DMNAME[11]
- (12) ^DMNAME[12]
- (13) ^DMNAME[13]

(14) ^DMNAME[14]  
(15) ^DMNAME[15]  
(97) Someone else”  
: 1..97

## Health and ability to work

New answer categories have been added to a number of existing health questions, and changes have been made to the routing of the EU child health questions so that information is only captured for 15-19 year olds. Additionally, the question order has been amended slightly so that adult health and child health questions are now asked in the same order.

Changed 

### ? Health Problems cause Difficulties

↔ Dis1

#### SHOW CARD E1

**Do any of these conditions or illnesses affect you in any of the following areas?**

1. Vision (for example blindness or partial sight)
2. Hearing (for example deafness or partial hearing)
3. Mobility (for example walking short distances or climbing stairs)
4. Dexterity (for example lifting and carrying objects, using a keyboard)
5. Learning or understanding or concentrating
6. Memory
7. Mental Health
8. Stamina or breathing or fatigue
9. Socially or behaviourally (for example associated with autism, attention deficit disorder or Asperger's syndrome)
10. Other
11. Refusal (spontaneous)
12. *None of the above (spontaneous)*


Changed 

### ? Ever had limiting longstanding illness

↔ DDATreP1

**Did this condition or illness (Did these conditions or illnesses, when taken singly or together) reduce your ability to carry out day-to-day activities? If you were receiving medication or treatment, please consider what the situation would have been without medication or treatment.**

1. Yes a lot
2. Yes a little
3. Not at all
4. *Don't know*

Changed 

If child age >15

### ? General Health children

↔ EUHealth

**How is [NAME] health in general; would you say it was...**

1. Very good
2. Good
3. Fair
4. Bad
5. Or very bad



Changed 


**? Health Problems cause Difficulties**

↔ CDis1

**Do any of these conditions or illnesses affect [child's name] in any of the following areas?**

**SHOW CARD E1**

1. Vision (for example blindness or partial sight)
2. Hearing (for example deafness or partial hearing)
3. Mobility (for example walking short distances or climbing stairs)
4. Dexterity (for example lifting and carrying objects, using a keyboard)
5. Learning or understanding or concentrating
6. Memory
7. Mental Health
8. Stamina or breathing or fatigue
9. Socially or behaviourally (for example associated with autism, attention deficit disorder or Asperger's syndrome)
10. Other
11. Refusal (spontaneous)
12. *None of the above (spontaneous)*

Changed 

**? Ever had longstanding illness**

↔ CDisDifP1

**Has [child's name] ever had any physical or mental health conditions or illnesses which lasted 12 months or more?**

1. Yes
2. No

Changed 


**? Ever had limiting longstanding illness**

↔ CDDAPrg1

**Can I just check - has [child's name] ever been diagnosed with any physical or mental health conditions or illnesses which could reduce his/her ability to carry-out day-to-day activities in the future?**

This is an opinion question.

1. Yes, activities could be reduced a lot
2. Yes, a little
3. Not at all

Changed 

**? Ever had limiting illness**

↔ CDDaTreP1

**Did this condition or illness (Did these conditions or illnesses, when taken singly or together) reduce his/her ability to carry out day-to-day activities? If you were receiving medication or treatment, please consider what the situation would have been without medication or treatment.**

1. Yes activities reduced a lot
2. Yes a little
3. Not at all
4. *Don't know*

## Access to medical and dental care

Routing to EUCMedRec and EUCDenRec has been changed so that it only captures information for 15-19 year olds.

Changed 

If child age >15

? **Not received medical care - children**

↔ **EUCMedRec**

**Was there any time in the last 12 months when, in your opinion, [child's name] needed a medical examination or treatment for a health problem but did not receive it?**

1. Yes
2. No

Changed 

If child age >15

? **Did not receive dental care - children**

↔ **EUCDenRec**

**Was there any time in the last 12 months when, in your opinion, [child's name] needed a dental examination or treatment but did not receive it?**

1. Yes
2. No

## Education and awards

Removed 

Adult Learning Grant questions **ALG**, **ALGAmt**, and **ALGPd** have been removed this year, and replaced by questions relating to the replacement scheme – Discretionary Learner Support

Added 

★ ***Received money from Discretionary Learner Support***

↔ **DLS**

***Have you received any support from the Discretionary Learner Support Fund?***

1. Yes
2. No

Added 

If DLS=Yes

★ ***Type of support***

↔ **DLSVal**

***Was this support in the form of ... READ OUT...***

1. *money,*
2. *or some other kind of support?*

Added 

If DLSVal=Money

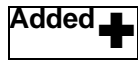
★ ***How much received***

↔ **DLSAmt**

***How much did you receive last time?***

**ENTER AMOUNT**

**0..99997**



### ☆ *Period of Discretionary Learner Support Fund*

↔ *DLSPd*

**What period did this cover?**

## Employment status

The answer options at Train have been updated to reflect recent policy reforms. This includes removing the New Deal and replacing it with the Work Programme – the current government’s primary training scheme for the long-term unemployed.



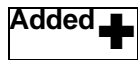
### ? **Government Training**

↔ **Train**

#### **SHOW CARD F3**

**Last week, that is in the seven days ending Sunday the [date], were you on any of the following schemes?**

1. *Work Club or Enterprise Club*
2. *New Enterprise Allowance*
3. *Work Experience*
4. *Work Trial*
5. *Work Programme*
6. *Training for Work [Scotland only option]*
7. *Get Ready for Work [Scotland only option]*
8. *Any other training scheme*
9. *None of these [spontaneous only]*



/ Question Information for Government Training (F9 helpscreen)

**Note:** Include people who were temporarily away from a scheme because of illness or holiday or some other reason.

Work Clubs and Enterprise Clubs provide unemployed people with a place to meet and exchange skills, share experiences, find opportunities, make contacts and get support to help them in their return to work. Enterprise clubs also provide those interested in self-employment with a place to make contacts and encourage each other to work through their business ideas.

New Enterprise Allowance will offer support to JSA claimants interested in self-employment. During an initial pre-start up phase, they will remain on benefit, but work with a volunteer business mentor, who will provide them guidance and support as they develop their business idea. If they need start-up capital they may also apply during this period for an unsecured loan of up to £1,000 to help them with start-up costs such as buying their initial equipment.

Once the claimant has demonstrated that their business idea is viable and has growth potential, they move into a second phase by starting their business and receiving financial support. They will continue to receive support from their mentor through the early stages of trading, but they will no longer receive JSA, instead receiving a weekly allowance for the first 26 weeks, in addition to any income from their new business.

Work Experience offers unemployed people aged 18-24 years between two and eight weeks' work experience, for perhaps 20-30 hours a week. During this time they continue to receive benefit payments rather than any wage from the employer. Both the claimant and the employer receive support from Jobcentre Plus throughout the placement, and claimants will also continue to actively seek employment as part of the usual conditions for claiming unemployment benefit.

... an optional extension to Work Experience, to a total of up to 12 weeks, is possible if the employer decides they would like to offer the participant an Apprenticeship and that offer is accepted. The start of the apprenticeship begins when the employer starts paying a wage and the claimant leaves benefit.

Work Trials have been available to claimants in various guises since 1989. There are some overlaps with Get Britain Working measures such as Work Experience, but there are no immediate plans to close them. They offer both participants and employers an opportunity to 'try before you buy', by placing them in a specific vacancy that the employer is actively trying to fill, for up to six weeks during which they receive no pay but continue to receive benefit. At the end of the Work Trial the employer must decide whether to retain the employee and start paying them.

The Work Programme offers support to the long-term unemployed or those with more complex barriers to work, through contracted 'providers' of support from the private and third sectors. The Programme is specifically designed to give freedom to providers to design their own programmes around local circumstances and the needs of each claimant. We might expect this to concentrate on training and supporting job-search activities, but it does not preclude other support. For example this might stretch from life skills at one end of the scale (an example of 'healthy eating' training has been cited), to subsidised employment at the other. The provider is rewarded once the claimant has been placed in work and no longer receives benefit. The employee may continue to receive support from the provider, who receives more payments the longer they remain in work.

Training for Work provides vocational training support to people aged 18 or over who have been continuously unemployed for at least 13 weeks and are actively looking for work. It also provides employers with suitably trained employees or helps them train new recruits in the skills required by their industry sector.

Get Ready for Work programme is open to young people aged 16 to 19 who need a little help in preparing to enter the world of work. Get Ready for Work programme arranges skills training and work placements for people who are finding it difficult to access training, learning and employment. The programme helps 16-19 year olds plug any gaps in basic skills so they can enter the labour market and find employment.

Any other training scheme covers anything not listed above. These might include....

- Work Together is a scheme to encourage all unemployed people and people on inactive benefits to consider volunteering as a way of improving their employment prospects while they are looking for work. They are signposted to local organisations that have agreed to support unemployed people, on-line support (such as Do-it) and specific opportunities in their communities.

- Sector-based work academies will bring local employers, further education colleges and Jobcentre Plus together to offer a combination of pre-employment training and work experience for unemployed people, over a period of up to 6 weeks. The work experience element must be directly linked to vacancies with the employer that they can apply for - including a guaranteed interview - although the vacancy will also be open to applicants outside the scheme so there is no guarantee of employment. The claimant remains on benefit over the whole period.
- Youth employment refers to a package of support for young people. This involves funding for additional places, fast-tracked places and additional support within existing programmes and schemes.
- Employment Support Allowance (Work Related Activity Group) will be entitled to support in some of the areas above. In addition, they may be entitled to Return to Work Credit or Permitted Work. The former can be paid to employees leaving IB/ESA for up to 52 weeks in addition to their wages, and is conceptually similar to working tax credits. The latter refers to small amounts of paid work that can be undertaken without a reduction in benefit payments.
- Mandatory Work Activity can be required of a small number of JSA claimants who need to re-engage with the system, refocus their job search and gain valuable work-related disciplines, such as attending on time and regularly, carrying out specific tasks and working under supervision. It takes the form of a placement for up to 30 hours a week, for four weeks, which delivers a contribution to the local community.
- Post-Work Programme Support, for those who have finished two years of the Work Programmes without finding employment. It does not come into play until 2013, but might potentially include additional schemes. Although numbers will be small, it may involve work experience activity, particularly community work.
- Work Choice and Access to Work are aimed at disabled people with more complex support needs that could not be met through other employment support provision. It represents additional help with barriers to work and therefore does not constitute a separate scheme or work-based activity in itself.
- The Flexible Support Fund offers Jobcentre Plus offices more freedom to tailor their support to individual claimants. They will mainly choose from a menu of options, covered by the list above, but could potentially set up their own schemes.
- Jobcentre Plus Skills Offer provides fully funded training to help claimants enter work, delivered through colleges and other Skills Funding Agency-funded providers. In addition, funding will be available for training to meet basic literacy and numeracy needs, and to achieve a first full level 2 qualification. Young people will also be entitled to a first full qualification at level 2 or level 3. This represents a range of different learning activities to improve employability in the immediate-term to the longer-term. None of them are linked directly to specific employers or vacancies.



*☞ Soft Check*

*The 'Training for Work' and 'Get Ready for Work' schemes only operate in Scotland. Please check, and if this was correctly reported, please explain the circumstances in a note.*

Routing to **Training Allowance** has changed and is now asked of all respondents who report being on any of the training courses at Train.

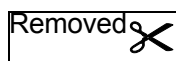


**? Training Allowance**

☞ **TrnAllow**

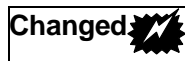
**Are you currently receiving a training allowance for this training scheme?**

1. Yes
2. No



The follow-up question to Train (**NDealType**) has been removed in this version of the questionnaire. This scheme no longer operates in the UK.

There has been a small change to the question wording at **NoWork**



**? Reason Not Wanting Work**

☞ **NoWant**

**ASK OR CODE (e.g. 3-6)**

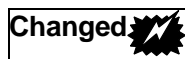
**May I just check, what was the main reason that you did not want, or look for, work (in the last 4 weeks)?**

1. Waiting for the results of an application for a job
2. Student
3. Looking after the family/home
4. Caring for a disabled/elderly person
5. Temporarily sick or injured
6. Long-term sick or disabled
7. Doesn't need employment
8. Retired from paid work
9. Any other reason

The respondent's answers to these questions should be accepted. If, in exceptional cases, the answer covers more than one coding category - ask which the main reason is and code that one only.

An informant who left work early on a Government Job Release scheme should be treated as retired.

There has also been a small change to the interviewer note at **Abs1No**, as interviewers are no longer asked to record work absences of less than a week in days.



**? Number of Weeks Absent**

☞ **Abs1No**

**How many weeks in all have you been away during this spell of absence?**

*IF LESS THAN ONE WEEK CODE 0.*

## Employee pay details

A new answer category has been added at **FuelTyp**

### Changed ? What fuel does company car use

↔ **FuelTyp**

**What fuel does your company car use?**

1. Petrol
2. Diesel
3. Biofuel e.g. E85 fuel
4. Hybrid (use a combination of petrol and electricity)
5. Electric
6. *Liquid Petroleum Gas (LPG)*
7. Other
8. Don't know

## Pension schemes

A number of changes have been made to the pensions block to reflect the new auto-enrolment policy. Under the new scheme, employees (who meet certain criteria) will be automatically enrolled into a workplace pension, which both they and their employer contribute to.

### Changed ? Employer Scheme

↔ **EmpSchm**

**Does your employer run a pension scheme for any employees?**

1. Yes
2. No

**INTERVIEWER:** Do not record details of frozen pensions in the pensions section. Only record if contributions are paid into the pension.

**INTERVIEWER:** *From October 2012 (in a staged approach) all employers should offer a workplace pension to eligible employees and make a minimum contribution.*

### Changed ? Eligibility for Employer Scheme

↔ **EligSchm**

**Are you eligible to belong to a pension scheme run by your employer?**

**Interviewer:** Employers may provide a pension scheme that is only open to senior management or permanent staff.

1. Yes
2. No
3. Don't Know

**INTERVIEWER:** *Following auto-enrolment, employees are eligible for a workplace pension provided by the employer if they are not already in a qualifying workplace pension, are aged 22 or over and under state pension age, earn more than a minimum amount each year (currently £8,105) and work or usually work in the UK.*

Changed: 

#### Question Information for Type of Scheme

It may be helpful to consult a payslip if available.

Code 1: If the scheme is fully contributory, a typical contribution would be about 8% of gross pay. Sometimes an extra contribution of perhaps 1% or 2% for dependents (e.g. widows/widowers pension) may be made.

*Those automatically enrolled into a workplace pension will contribute along with their employer and the Government. Please use option 1 "contributions are taken out of my pay each week or month" in this circumstance.*

Code 2: applies if the employee does not contribute to the basic pension - the employer pays it all - but does pay a contribution of perhaps 1% or 2% of pay for extra benefits for self or dependents (e.g. widows/widowers pension). Such an arrangement applies to Civil Servants and some other public servants.

Code 3: applies if the employee does not contribute to the pension at all.

Changed: 

#### Question Information for NI Contributions in Pension

##### State Pensions

The pension paid from the state can be divided into essentially two layers.

##### The Basic State Pension

The Basic State Pension provides a basic flat-rate level of pension, rising year on year with the rise in price inflation and is available to all those who have paid a sufficient number of years of National Insurance contributions.

##### Additional State Pension

The second layer is an earnings related pension and effectively provides a top-up pension based on an individual's level of earnings over their career. Unlike the Basic State Pension, the amount of pension the individual receives from the Additional State Pension is dependent upon the amount the person earned, and hence the total National Insurance contributions they paid across their career.

##### Contracting Out

Contracting out is a mechanism that permits individuals to give up their right to an Additional State Pension and either pay a reduced level of National Insurance in the case of an Occupational Pension scheme or receive a rebate from the Inland Revenue in the case of Personal/Private or Stakeholder Pensions. Instead of paying into the State Earnings Related Pension Scheme (SERPS) or into the State Second Pension (S2P), employees can join a contracted out occupational pension scheme (if the employer operates one) or take out an appropriate personal pension.

##### Auto-enrolment



*Those automatically enrolled into a workplace pension will contribute along with their employer and the Government. Please use option 3 “both contribute” in this circumstance*

## Benefits

The benefits block has been completely reshaped for this year's questionnaire. Benefits have been grouped together in a more meaningful way, questions about Housing Benefit and Tax Credits, which used to feature earlier in the questionnaire, have been moved to the benefits block, in preparation for the staged roll-out of Universal Credit<sup>1</sup>, and a substantial number of questions (and their corresponding showcards), have been moved, updated or replaced. The new block is set out here as it appears in FRS 13-14.

### ★ Working age benefits

#### ↔ WAgeBen

#### SHOWCARD H1

**Looking at this card, are you at present receiving any of these state benefits in your own right: that is, where you are the named recipient?**

1. Universal Credit
2. Housing benefit
3. Working tax Credit(excluding any childcare element of Working Tax Credit)
4. Child tax Credit (including any childcare element of Child Tax Credit)
5. Income Support
6. Jobseekers Allowance
7. Employment and Support Allowance
8. Carer's Allowance
9. None of these
- 10.(SPONTANEOUS) One of these / more than one of these, but don't know which

/ Question information for working age benefits

#### Universal Credit (UC)

Universal Credit (UC) will replace income-based JSA, income related ESA, Income Support, Child Tax Credits, Working Tax Credits, and Housing Benefit, mainly for those aged 18 to State Pension Age (SPA) from October 2013 (and some pilot areas from April 2013). Under Universal Credit, claimants will have to meet certain requirements that reflect the work-related activity they can be reasonably expected to undertake given their capabilities and circumstances.

Universal Credit will be made up of a standard allowance plus additional elements. There are up to six additional elements, which depend on a claimant's circumstances: child element(s); disabled and severely disabled child additions; a childcare element; a carer element; elements for individuals with a limited capability for work, and a higher rate for those with a limited capability for work-related activity; and a housing element (rent and support for mortgage interest).

The standard allowance and additional elements make up a notional maximum out-of-work award. Actual awards will be affected by income, capital and work. In-work claimants have an initial amount of earnings disregarded (their Work Allowance), with net earnings exceeding this amount reducing their UC award by 65p in every pound earned. Payments under Universal Credit will usually be made on a monthly basis.

<sup>1</sup> Housing Benefit and Tax Credits will be replaced by Universal Credit.

### Child Tax Credit

Child Tax Credit is a payment to support families with children. Parents can claim Child Tax Credit if they are responsible for one or more children, and do not have to be working. Child Tax Credit was introduced to provide support for children up until their 16th birthday, and young persons aged 16-18 years who are either in full time non-advanced education or have left full time education but do not have a job (providing they are not claiming income support or tax credits in their own right). The awarding of Child Tax Credit will not affect a respondent's right to Child Benefit. Families will still be able to claim Child Benefit as they do now and it will continue to be paid as a separate payment.

Child Tax Credit is paid directly to the person who has main responsibility for caring for the children in the family (into a bank or building society account). The recipient can choose whether to receive the payments weekly or every four weeks. If the respondent qualifies for Income Support or income-based Jobseeker's Allowance, they will be entitled to the maximum amount of Child Credit for their children.

### Working Tax Credit

Working Tax Credit is a payment to top up the earnings of working people on low incomes, including those who do not have children. There are extra credits for those recipients in working households where someone has a disability (known as the disability element). Tax Credit is available to employees and the self-employed, and includes support for the costs of qualifying childcare.

People who are responsible for a child or young person can claim Working Tax Credit if they are aged 16 or over and work at least 16 hours per week. People without children can claim Working Tax Credit if they are

- i) aged 25 or over and work at least 30 hours a week;
- ii) aged 16 or over, work at least 16 hours a week and have a disability which puts them at a disadvantage in securing employment; or
- iii) either the claimant or their partner are aged 50 or more, work at least 16 hours per week and are returning to work after time spent on qualifying out-of-work benefits.

Working Tax Credit is paid in addition to any Child Tax Credit the recipient may be entitled to and is based on the number of hours normally worked and income (joint income for couples). The recipient will normally receive the payment of Working Tax Credit into an account (through a bank, building society, or post office account) in a similar manner as a benefit payment. If the respondents are part of a couple that both work at least 16 hours per week, they can decide who will receive the payments of Working Tax Credit.

Working Tax Credit also makes an allowance for extra financial help towards the costs of approved or registered child care. This is known as the child care element within Working Tax Credit. Respondents will only be entitled to this if they are working at least 16 hours per week. If a respondent is eligible to receive the child care element of Working Tax Credit, this **will always** be paid to the person who is mainly responsible for caring for the child or children, and will form part of their payment of Child Tax Credit (i.e. it is not paid as an element of Working Tax Credit).

### Income Support (IS)

Income Support is for people aged 16 or over whose income is below a certain level.

To get Income Support you must be:

sick or disabled OR

a lone parent or foster parent OR

getting Invalid Care Allowance/Carer's Allowance for looking after someone.

You cannot get Income Support if you work for 16 hours a week or more on average (or if

your partner works for 24 hours a week or more on average). Income Support can be paid to top up other benefits, or earnings from part-time work, or if there is no money coming in at all. The amount depends on age, whether the person has a partner, dependant children, whether anyone has a disability, weekly income and savings. The savings limit for the claimant (and partner if any) is £16,000.

If the respondent is coded as receiving both Income Support and Jobseeker's Allowance the following check is triggered.

#### Jobseeker's Allowance (JSA)

From October 1996 Jobseeker's Allowance replaced Unemployment Benefit (UB) and Income Support (IS) for unemployed people (i.e. people actively seeking work but who weren't eligible for Unemployment Benefit). Recipients of those benefits were automatically transferred to JSA.

The basic rules for receipt of JSA are that the claimant must be out of work or working less than 16 hours a week; be capable of work, available for work (usually of at least 40 hours a week) and actively seeking work; have a Jobseeker's Agreement with the Employment Service; be aged 18 or over and under state pension age; and any studying must only be part-time. (See under **Type of Jobseeker's Allowance** below for further details of JSA).

#### Employment and Support Allowance (ESA)

Employment and Support Allowance (ESA) is to be paid to new claimants from October 2008, with existing Incapacity Benefit and Income Support claimants being migrated to ESA over time.

Main phase - Claimants of Main Phase ESA will receive a basic payment at JSA (25+) rates, an additional 'work related activity component' or 'support component' and, in some cases, an extra premium.

Work related activity component - Those assessed at the PCA as having 'limited capability for work' will receive this component.

Support component - Awarded to a minority of claimants who are assessed at the PCA as having 'limited capability for work' and 'limited capability for work-related activity'.

Extra Premiums - Severe Disability Premium (SDP), Enhanced Disability Premium (EDP), Carer Premium, Pensioner Premium and Higher Pensioner Premium currently payable with IS and IB will still be payable as a premium on top of ESA.

*If WAgeBen = 3. WTC, BUT no child under 19 in household and no adult aged 25 and over working for 30 or more hours per week.*

#### ☞ Soft Check

Working Tax Credit is normally only paid to households without children if there is an adult in the household who is aged at least 25 and working for 30 hours or more per week.

Are you responsible for a child under 19 who is not here? Or is there an adult in the household who is disabled and is either working for at least 16 hours per week or is expecting to start work in the next 7 days?

**INTERVIEWER:** IF NO SUCH ADULT BUT RECEIVED WTC SUPPRESS AND MAKE A NOTE.

*If WAgeBen = 3. WTC, and there is a child aged under 19 in the household BUT no adult who works for 16+ hours per week.*

☞ Soft Check

Working Tax Credit is normally only paid if there is an adult in the household working for 16 or more hours per week.

PLEASE CHECK: Is there an adult expecting to start work within 7 days?

**INTERVIEWER:** IF NO SUCH ADULT BUT RECEIVED WTC SUPPRESS AND MAKE A NOTE

*If WAgeBen =4. CTC, BUT no child aged under 19 in household.*

☞ Soft Check

Child Tax Credit is normally only paid if there is a child aged under 19 in the household.

PLEASE CHECK: Did you have a child for whom you are responsible but who is not here at present?

**INTERVIEWER:** IF NO CHILD BUT RECEIVED CTC SUPPRESS AND MAKE A NOTE.

*If WAgeBen = 3. WTC and there is a child in the household but WAgeBen does not include CTC as well.*

☞ Soft Check

There is a child in the household and Working Tax Credit has been selected, but not Child Tax Credit. Please amend.

*If both adults in the same benefit unit both report being in receipt of CTC / WTC (If WAgeBen = 3. or 4. for both members of the same BU)*

☞ Soft Check

Although both adults may be included in Tax Credit correspondence, the money is only paid to one of them.

**INTERVIEWER:** Please check who receives this payment and amend answers to WAgeBen accordingly

*If WAgeBen = 6. JSA, but R previously reported being in work*

☞ Soft Check

Respondent is coded as working more than 16 hours a week and receiving Jobseeker's Allowance. Tactfully check this. (JSA is not usually payable in this situation).

It is possible to work under 16 hours a week and to receive JSA, if the earnings are under certain amounts.

*If WAgeBen = 6. JSA AND 5. IS*

☞ Soft check

**Please check:** you cannot normally receive both Jobseeker's Allowance and Income Support at the same time. If correct, suppress the warning to continue and explain the reason in a Note.

**INTEVIEWER:** In case respondents confuse Income Support with (income-based) JSA the following check will be triggered if they said earlier that they were seeking work:

*If WAgeBen = 5. IS AND NOT 6. JSA and R previously reported being unemployed*

☞ Soft check

Are you sure? People who are looking for work (recorded earlier) would normally be receiving Jobseeker's Allowance, not Income Support.

*If respondents claim they are not in receipt of housing benefit but are receiving income support and if WAgeBen = 5. IS and not 2. Housing Benefit*

☞ Soft check

You and/or [name] said you are not in receipt of housing benefit, but one of you is receiving Income Support. Can I just check, is this correct?

*If WAgeBen = 8. CA, BUT R is in full-time education.*

☞ Soft Check

You cannot normally receive Carer's Allowance while you are in full-time education. Please check that your answer is correct. If so, please explain the circumstances in a note.

*If WAgeBen = 2*

**? Payment of Housing Benefit**

☞ **HBRecp**

**Is the Housing Benefit or Rent [allowance/rebate] paid directly to you or directly to your landlord?**

1. Directly to recipient of Housing Benefit or Rent [allowance/rebate] (i.e. the respondent or an appointee)
2. Directly to landlord / property agent

*If WAgeBen = 2*

**? Length of Housing Benefit**

☞ **HBWeeks**

**For how long have you been on Housing Benefit or rent allowance (this time)?**

**INTERVIEWER:** Please note that a number of changes of circumstances, not just a change of address could have resulted in the break of a claim (e.g. a partnership forming/dissolving, change in no. of dependents etc).

1. Up to 2 years
2. 2 years but less than 3
3. 3 years but less than 4
4. 4 years but less than 5
5. 5 or more years

*If HBWeeks = 1*

**? Length of Housing Benefit**

☞ **HBWeeks2**

**How many weeks you have been on Housing Benefit or Rent Allowance (this time)?**

*Enter number of weeks*

*If HBWeeks = 1*

**? Year claim began**

☞ **HBYear**

**Can I just check - in which year did you begin your current Housing Benefit?**

*Enter year*

*If HBWeeks = 1*

**? Month claim began**

☞ **HBMnth**

**And which month was that?**

1. January
2. February
3. March
4. April
5. May
6. June

7. July
8. August
9. September
10. October
11. November
12. December

*Ask WTCLum if WAgeBen = 3 (so If Working Tax Credit received)*

### **? Working Tax Credit Lump Sum**

↔ **WTCLum**

#### **SHOWCARD H2**

**Please look at card H2 and tell me in which of these ways you are currently receiving your Working Tax Credit?**

Prompt: Do you receive it in any other ways?

**INTERVIEWER:** If the respondent receives their tax credit as a regular payment then they should have received the latest payment within the last 4 weeks.

1. Lump Sum under £105 covering payments for the whole year
2. Regular payments via your bank, post office account or Giro

*If Working Tax Credit Lump Sum=2*

☞ Soft check

Working Tax Credit is normally only paid through these means if you have recently (in the last 8 weeks) had your award increased. Has this happened to you?

**INTERVIEWER:** If yes suppress check and make a note to explain the circumstances.

*If Working Tax Credit Lump Sum=1 and 2*

☞ Soft check

If you have received a lump sum covering the whole year then you should not also be receiving regular payments.

**INTERVIEWER:** If respondent says have received both check to see if respondent is actually talking about Child Tax Credit. Make a note to explain the circumstances.

*Ask CTCLum if WAgeBen = 4 (so If Child Tax Credit received)*

### **? Child Tax Credit Lump Sum**

↔ **CTCLum**

#### **SHOW CARD H3**

**Please look at card H3 and tell me in which of these ways you receive your Child Tax Credit?**

**INTERVIEWER:** If the respondent receives their tax credit as a regular payment then they should have received the latest payment within the last 4 weeks.

1. Lump Sum under £105 covering payments for the whole year
3. Regular payments via your bank, post office account or Giro

*If Child Tax Credit Lump Sum = 1 and 3*

☞ Soft check

If you have received a lump sum covering the whole year then you should not also be receiving regular payments.

**INTERVIEWER:** If respondent says have received both check to see if they are referring to Working Tax Credit not Child Tax Credit

*if WTCLum=1 'Lump sum payment' and CTCLum=1 'Lump sum payment'*

☞ Soft Check:

Are you sure? It isn't possible to receive a lump sum payment for Working Tax Credit AND Child Tax Credit. Please check with the respondent and amend the answer. Make a note of the circumstances if this check is suppressed and the answer not amended.

Ask if WAgeBen = 3. WTC or 4. CTC

**? Tax Credit Award Notice**

↔ TaxNotr

**Do you have a Tax Credit Award Notice from the Inland Revenue that you could consult?**

**INTERVIEWER:** This has 'TC602' at bottom left of page 1

1. Yes
2. No (unwilling)

Ask if TaxNotr = No and 2. BankPO in WTCLum or 3. BankPO in CTCLum then Taxstmt

**? Tax Bank Statement Consulted**

↔ TaxStmt

**ASK OR CODE... or is there a bank statement you could consult?**

1. Yes
2. No (unwilling)

Ask if WAgeBen = 3. WTC and WTCLum = 1, then separately for Child Tax Credit if WAgeBen = 4. CTC and CTCLum = 1

**? Amount of Lump Sum Payment**

↔ WTCLPay

↔ CTCLPay

**You said that you received a [Working Tax Credit/Child Tax Credit] lump sum payment covering the whole year. How much was this payment?**

**INTERVIEWER:** If respondent receives combined payment of Working Tax Credit and Child Tax Credit enter it here.

*If lump sum amount >£104*

☞ Soft check

Lump sum payments should not exceed £104 for the tax year. Check that this is not a one-off payment to correct for a previous under-payment. These should not be recorded at all. If their respondent receives a combined Working and Child Tax Credit lump sum payment and this has been entered here suppress and make a note.

Ask if WAgeBen = 3. WTC, then separately for Child Tax Credit if WAgeBen = 4. CTC

**? Amount of Last Payment**

↔ WTCamt

↔ CTCamt

**How much was received for your last [Working Tax Credit/Child Tax Credit] payment?**

1. Exclude lump sum payments covering whole year.
2. If respondent receives combined payment of Working Tax Credit and Child Tax Credit enter it here.

Ask if WAgeBen = 3. WTC, then separately for Child Tax Credit if WAgeBen = 4. CTC

**? Period Payment Covered**

↔ WTCPd

↔ CTCPd

**How long did this cover?**

- 1: One week
- 2: Two weeks
- 3: Three weeks
- 4: Four weeks
- 5: Calendar month
- 7: Two calendar months
- 8: Eight times a year

- 9: Nine times a year
- 10: Ten times a year
- 13: Three months/13 weeks
- 26: Six months/26 weeks
- 52: One Year/12 months/52 weeks
- 90: Less than one week
- 95: One off/lump sum
- 97: None of these (EXPLAIN IN A NOTE <Ctrl+M>)

**? Usual Amount of WTC**

↔ **UWTCamt**

**How much is usually received for your Working Tax Credit payment?**

**INTERVIEWER:** Exclude lump sum payments covering whole year.

**? Period Payment Covered**

↔ **UWTCPd**

**How long did this cover?**

- 1: One week
- 2: Two weeks
- 3: Three weeks
- 4: Four weeks
- 5: Calendar month
- 7: Two calendar months
- 8: Eight times a year
- 9: Nine times a year
- 10: Ten times a year
- 13: Three months/13 weeks
- 26: Six months/26 weeks
- 52: One Year/12 months/52 weeks
- 90: Less than one week
- 95: One off/lump sum
- 97: None of these (EXPLAIN IN A NOTE <Ctrl+M>)

*Ask if WAgeBen = 3. WTC,*

**? WTC with Disability Element**

↔ **WTCD**

**Does the payment of [amount given for Working Tax Credit] include a Disability element?**

- 1. Yes
- 2. No

**? Payment Includes CTC**

↔ **TaxComb**

**Does the [amount given for Working Tax Credit] you mentioned before also include a payment for Child Tax Credit?**

- 1. Yes
- 2. No

*Ask if WAgeBen = 4. CTC,*

**? Payment Include CCTC**

↔ **CCTC**

**Does this payment include a childcare element to help pay for child care expenses?**

- 1. Yes
- 2. No



## ? Type of Jobseeker's Allowance

### ↔ JSAType

There are two types of Jobseeker's Allowance. Is your Allowance...

1. ...contributory, that is based on your National Insurance contributions,
2. ...or is it income based Jobseeker's Allowance, which is based on an assessment of your income?
3. ...or is it a contribution of 'contributory' and 'income based'?

### ➤ Question Information for Type of Jobseeker's Allowance

There are two types of JSA:

- Contribution-based, which is dependent on the claimant having paid enough Class 1 National Insurance contributions in the previous two years. (Those who formerly received Unemployment Benefit were transferred to this type of JSA.) It is payable for up to 6 months.
- Income-based, which is dependent on the level of the claimant's income or savings. (Those who received Income Support as an unemployed person were transferred to this type of JSA.)

Only one type may be awarded at a time. Once the maximum time on contribution-based JSA has passed the claim will be reviewed to see if the person is eligible for income-based JSA. A claimant who satisfies the contribution conditions but whose income does not meet their needs will be awarded income-based JSA, which will include an element based on the contribution record. It is not possible to receive JSA and Income Support simultaneously.

There are fixed age-related rates for the allowance. For income-based JSA only, the claimant may get extra for an adult dependant and various other premiums. Payment is by giro cheque or direct to a bank account.

Small amounts may be earned from part-time work before affecting the benefit, the maximum that can be earned varying from £5 to £15 a week depending on which type of JSA is received, marital status, the number of hours worked by a partner, dependant children and other criteria.

There are some checks relating to the type of JSA. If the person was self-employed in their last job, and is coded as getting contribution-based JSA:

*If JSAType = 1. Contributory, but R has been unemployed for more than 3 years*

#### ☞ Soft check

Only people who have recently been employees can receive contributory JSA. Please check if they have been an employee in the last 3 years.

*If JSAType = 1. Contributory, but R has been unemployed for more than 6 months*

#### ☞ Soft check

Are you sure it is contribution-based JSA? Earlier they said they had not worked in over 6 months. Only Income-based JSA is payable after 6 months out of work. Check with respondent and explain in a note if correct.

*If WAgeBen = 6. 'JSA'*

**? How long in receipt of JSA**

↔ **JSAWks**

**For how long have you been receiving Job Seeker's Allowance?**

**INTERVIEWER:** Please record length of time since respondent started receiving payments, rather than when they first claimed the benefit.

1. Up to 2 years
2. 2 years but less than 3
3. 3 years but less than 4
4. 4 years but less than 5
5. 5 or more years

*If JSAWks = 1. Up to 2 years*

**? Weeks in receipt of JSA**

↔ **JSAWks2**

**Please tell me how many weeks have you been receiving Job Seeker's Allowance?**

**INTERVIEWER:** If respondent is unsure probe if they can remember the season, significant date or similar that may help recall number of weeks.

: 0..997

*If WAgeBen = 7. 'Employment and support Allowance'*

**? Type of ESA**

↔ **ESAType**

**There are two types of Employment and Support Allowance. Is your Allowance:**

1. ...'contributory', that is based on your National Insurance contributions,
2. ...or is it 'income based' Employment and Support Allowance, which is based on an assessment of your income?
3. ...or is it a combination of 'contributory' and 'income based'?

*If WAgeBen = 7. 'Employment and Support Allowance'*

**? How long in receipt of ESA**

↔ **ESAWks**

EMPLOYMENT AND SUPPORT ALLOWANCE

**For how long have you been receiving Employment and Support Allowance?**

**INTERVIEWER:** Please record length of time since respondent started receiving payments, rather than when they first claimed the benefit.

1. Up to 2 years
2. 2 years but less than 3
3. 3 years but less than 4
4. 4 years but less than 5
5. 5 or more years

*If ESAWks = 1. Up to 2 years*

**? Weeks in receipt of ESA**

↔ **ESAWks2**

EMPLOYMENT AND SUPPORT ALLOWANCE

**Please tell me how many weeks have you been receiving Employment and Support Allowance?**

**INTERVIEWER:** If respondent is unsure probe if they can remember the season, significant date or similar that may help recall number of weeks.

: 0..997

☆ **Disability Benefits**

## DisBen

### SHOW CARD H4

Looking at this card, are you at present receiving any of these state benefits in your own right: that is, where you are the named recipient?

1. Personal Independence Payment (including the car allowance known as Motability)
2. Disability Living Allowance (including the car allowance known as Motability)
3. Attendance Allowance
4. Severe Disablement Allowance
5. Incapacity Benefit
6. Industrial Injury Disablement Benefit
7. None of these
8. (SPONTANEOUS) One of these / more than one of these, but don't know which



Question Information for disability benefits

Disability Living Allowance and Personal Independence Payments (which is replacing DLA) have two elements and are directed at the care and mobility needs of **disabled people of working age and below**.

The **care component** has three rates and has replaced Attendance Allowance for those under retirement age.

The **mobility component** has two rates, the higher one being for those unable to walk or who are severely restricted, and replaced the old Mobility Allowance.

Motability is a registered charity through which those who receive the higher rate of Disability Living Allowance mobility component may hire or purchase a vehicle at a reduced rate. Either part or the whole of the allowance is paid to Motability. The full amount received including any paid direct to Motability should be recorded. If the amount entered is after deducting money paid direct to Motability, a check will trigger. Please enter the amount of the higher rate as displayed in the check.

#### Attendance Allowance

Is a benefit for people disabled **at or after age 65** who live at home and need looking after because of their physical or mental disablement. Attendance Allowance is not related to any income, savings or NI contributions and can be paid in conjunction with other benefits including Income Support. There are two rates - a lower one for people who need looking after by day **or** night, and a higher one for people who need looking after by day **and** night. Attendance Allowance for those disabled before they were 65 was replaced in April 1992 by Disability Living Allowance (Care component).

#### Receipt of both Retirement Pension/Widow's Pension/Bereavement Allowance/Widowed Mother's Allowance/Widowed Parent's Allowance and Attendance Allowance or Disability Living Allowance

Recipients of Retirement Pension, Widow's Pension, Bereavement Allowance, Widowed Mother's Allowance, Widowed Parent's Allowance may also get **Attendance Allowance** or DLA (but not both); the **Attendance Allowance** /DLA may be paid separately from the RP/WP/BA/WMA/WPA, or as a component of it. In either case, the **Attendance Allowance** /DLA should be coded at **DisBen**.

#### Incapacity Benefit (IB)

IB is paid to people who have been medically assessed as incapable of working and who cannot get Statutory Sick Pay from an employer. If a person is/was receiving Statutory Sick Pay, Incapacity Benefit replaces it after 28 weeks. It is a contributory benefit; it is not means-tested. There are three basic rates:

- the short term lower rate for the first 28 weeks of sickness;
- the short term higher rate for weeks 29-52;
- and the long term rate from week 53.

Extra benefit may be paid for dependant adults and children. For new claimants, entitlement ends at state pension age.

Since 31<sup>st</sup> January 2011 no new incapacity claims have been accepted, people now may be able to claim Employment and Support Allowance (ESA)

#### Industrial Injuries Disablement Benefit

For those disabled as a result of an accident at work or as a result of a prescribed industrial disease. It can be received even if the recipient continues/returns to work.

Do NOT include receipt of Reduced Earnings Allowance (REA), at this question. It should be recorded at the 'any other state benefit' code at Ben5Q. See the later instruction at that question for the definition of REA.

*If respondent is recorded as receiving AA, but is aged under 65:*

#### ☞ Soft check

The respondent is recorded as receiving Attendance Allowance, but is not 65 or older. Please check your answer is correct. If so, explain circumstances in a note.

*If respondent is recorded as receiving SDA, but is not recorded as out of work*

#### ☞ Soft check

The respondent is recorded as receiving Severe Disablement Allowance, but is not recorded as being out of work. Please check whether your answer is correct. If so, explain circumstances in a note.

*If DisBen = 1. Personal Independence Payment*

#### ★ **Type of Personal Independence Payment**

#### ↔ **PIPtype**

**There are two types of Personal Independence Payment. Is your Allowance:**

1. 'Daily Living' only, or
2. 'Mobility' only, or
3. Both – 'Daily living and Mobility'?

*If PIPtype = 2. 'Mobility' or 3. 'Both'*

#### ★ **PIP motability**

#### ↔ **PIPMota**

**Is your Personal Independence Payment the car allowance known as Motability?**

1. Yes
2. No
3. (SPONTANEOUS) Don't know

*If DisBen = 2. Disability Living Allowance*

#### ★ **Type of Disability Living Allowance**

#### ↔ **DLAtype**

**There are two types of Disability Living Allowance. Is your Allowance:**

1. 'Care' only, or
2. 'Mobility' only, or
3. Both – 'Care and Mobility'?

*If DLAtype = 2. 'Mobility' or 3. 'Both'*

☆ **DLA motability**

↔ **DLAMota**

**Is your Disability Living Allowance payment the car allowance known as Motability?**

1. Yes
2. No
3. (SPONTANEOUS) Don't know

☆ **Pensioner Benefits**

↔ **PenBen**

**SHOW CARD H5**

**Looking at this card, are you at present receiving any of these state benefits in your own right: that is, where you are the named recipient?**

1. Pension Credit
2. State Retirement Pension
3. Widow's Pension, Bereavement Allowance or Widowed Parent's (formally Widowed Mother's Allowance)
4. Armed Forces Compensation Scheme (formally War Disablement Pension), including Guaranteed Income Payments
5. War Widow's / Widower's Pension (and any related allowances)
6. None of these
7. (SPONTANEOUS) One or more of these, but don't know which

/ Question Information for Pensions and Allowances

Widow's Pension

For those respondents widowed after April 2001, Widow's Pension will no longer be payable (replaced by Bereavement Allowance). However, existing widows will continue to receive it. Widow's Pension is a weekly benefit for women aged 45 and over (or 40 and over if widowed before April 1988) paid when their husband died or when their Widowed Mother's Allowance ends. Widows over 60 may opt to keep receiving Widow's Pension until they are 65, instead of Retirement Pension. Include Industrial Widow's Pension: paid to widows of those who died as a result of an accident at work or a prescribed disease.

Widowed Mother's Allowance

Was a weekly benefit for widows of any age who have at least one child for whom they get Child Benefit. This was discontinued in April 2001 and replaced with Widowed Parent's Allowance.

Widowed Parent's Allowance

Replaced Widowed Mother's Allowance in April 2001. Widowed Parent's Allowance extends the benefit to fathers as well as mothers. Payments to widowed fathers will be retrospective in the sense that although payments will only start from April 2001, they will be paid to both existing and new widowed fathers with dependent children. As with the redundant Widowed Mother's Allowance, there will be both basic and Second State Pension (formerly SERPS) elements payable, and additions for each dependent child.

Bereavement Allowance

For those widowed after April 2001, Widow's Pension will no longer be payable. Instead, there will be a new benefit called Bereavement Allowance. This is time limited and is paid for 1 year only. In addition the State Second Pension (formerly SERPS) element will no longer be payable. Bereavement Allowance will be payable to both widows and widowers who are aged 45 and over, and there will continue to be an age related scale for those widowed aged 45-55.

All these benefits are contributory, taxable and subject to normal income related benefits rules, and are paid on the basis of the contributions of the deceased spouse.

Note that Bereavement Payment (formerly Widow's Payment) should not be included here; it is a lump sum payment and there is a code for it at the later question on lump sum state benefits

#### Question Information for War Pensions and Allowances

On 2 April 2002 the War Pensions Agency was renamed the 'Veterans Agency.' This agency now administers pensions to armed forces/ex-armed forces personnel and their dependents.

#### War Disablement Pension

Is payable to people disabled as a result of service in the Armed Forces during the First World War or at any time since 1939. The amount received depends on severity of disablement and rank.

War Widow's/Widower's Pension is payable to widow/ers and children of someone killed in the Armed Forces or who died as a result of injury sustained in the Armed Forces.

Severe Disablement Allowance may be received by people of working age who have been unable to work for 28 weeks or more because of illness or disablement, but cannot get Incapacity Benefit because they have not paid enough NI contributions.

#### Armed Force Compensation Scheme

The Armed Forces Compensation Scheme (AFCS) is a compensation scheme for all members of the Regular and Reserve Forces. It provides compensation for all injuries, ill-health and deaths that are mainly due (attributable) to service, the main cause of which occurred on or after the introduction of the scheme on 6 April 2005.

*If there are any children in the same benefit unit as a widow/widower under 65 who is not recorded as receiving Widowed Parent's Allowance:*

#### ☞ Soft Check

Respondent is a widow/widower under 65 with dependent child[ren], but is not getting Widowed Parent's Allowance. Please check that this is correct.

*If PenBen DOES NOT = 2. State Retirement Pension and R meets the age criteria*

#### **? Deferred State Pension**

#### **☛ DefrPen**

**INTERVIEWER:** The respondent is aged 65 or over (male) or over 60 (female) and so could collect state pension BUT they have not reported having NI retirement Pension (or Widow's Pensions / Bereavement Allowance) or Old Person's Pension. However, some people defer taking up their state pension in order to build up extra State Pension which they receive when they start claiming State Pension. This question is checking whether people have deferred taking up State Pension.

#### **Have you deferred taking up your State Pension?**

1. Yes
2. No

*If DefrPen = 2 'No'*

#### ☞ Soft Check

**INTERVIEWER:** It appears that the respondent is not claiming Retirement pension and has not deferred their State pension. Please check the reasons for this and explain in a note.

|If PenBen = 3.

**? Type of Widows Pension/Allowance**

↔ **Wid**

**INTERVIEWER:** ASK OR RECORD WHICH ONE WAS RECEIVED

1. Widow's Pension
2. Widowed Mother's Allowance
3. Bereavement Allowance
4. Widowed Parent's Allowance

*If DLAtype = 1. Care component, or 3. both*

**? Disability Living Allowance 1**

↔ **DC**

**Is this Care Component of DLA paid as part of your [Retirement Pension / Widow's Pension / Bereavement Allowance / Widowed Mother's Allowance / Widowed Parent's Allowance], or do you receive a separate payment?**

1. Paid as part of pension
2. Separate payment

*Ask if DLAtype = 2 'Mobility' or 3 'Both'*

**? Disability Living Allowance 2**

↔ **DM**

**Is this Mobility Component of DLA paid as part of your [Retirement Pension/ Widow's Pension/Bereavement Allowance/Widowed Mother's Allowance/Widowed Parent's Allowance], or do you receive a separate payment?**

1. Paid as part of pension
2. Separate payment

*If DisBen = 3. AA*

**? Attendance Allowance**

↔ **AA**

**Is this Attendance Allowance paid as part of your [Retirement Pension / Widow's Pension / Bereavement Allowance / Widowed Mother's Allowance / Widowed Parent's Allowance], or do you receive it separately?**

1. Paid as part of pension
2. Paid separately

☆ **Child Benefits**

↔ **KidBen**

**SHOW CARD H6**

**Looking at this card, are you at present receiving any of these state benefits in your own right: that is, where you are the named recipient?**

1. Child Benefit
2. Guardian's Allowance
3. Maternity Allowance
4. None of these
5. (SPONTANEOUS) One or more of these, but don't know which

*If KidBen DOES NOT = 1. Child benefit BUT DepChild = 1 (i.e. respondents with dependent children who have not reported being in receipt of Child Benefit):*

☆ **Child benefit check**

↔ **CBChk**

**Can I just check, you didn't report receipt of Child Benefit - is this because...**

1. You have chosen to stop receiving Child Benefit payments due to having a high income?

2. You have not applied for Child Benefit?
3. Other?

**INTERVIEWER:** please explain circumstances in a note

*If respondents report receipt of Child Benefit (i.e. If **KidBen** = 1):*

☆ **High income tax charge on Child Benefit**

↔ **CBTax**

**Can I check - do you pay a high income Child Benefit tax charge on the Child Benefit you receive?**

1. Yes
2. No

**INTERVIEWER:** Since January 2013 families where at least one parent earns £50,000 or more a year have had to pay a High Income Child Benefit charge on the Child Benefit they receive. This charge is paid through the tax system. Some families may have decided to stop receiving Child Benefit payments rather than repay the money through tax.

*If respondents report paying a high income Child Benefit tax charge (i.e. If **CBTax** = 1):*

☆ **High income charge on Child Benefit via PAYE**

↔ **CBPAYE**

**Do you make that payment through work (PAYE)?**

1. Yes
2. No

**INTERVIEWER:** All those paying the charge will have a choice to pay the charge directly themselves, or, if they are in PAYE, pay the charge through their tax code, i.e. it is included in their regular tax payments

*If respondents do report paying a high income Child Benefit tax charge (i.e. If **CBTax** = 1):*

☆ **Annual Child Benefit tax charge**

↔ **CBTaxAmt**

**How much this last time?**

: 0.01...9999.97

**INTERVIEWER:** This may have been calculated by the respondent on their last self-assessment return, if they have completed their tax return. Alternatively they may have an estimate of the liability from an online calculator. Most respondents should be able to provide an annual amount.

*If **CBTaxAmt** = response then:*

☆ **Annual Child Benefit tax charge period**

↔ **CBTaxPd**

**What period did this cover?**

- 1: One week
- 2: Two weeks
- 3: Three weeks
- 4: Four weeks
- 5: Calendar month
- 7: Two calendar months
- 8: Eight times a year
- 9: Nine times a year
- 10: Ten times a year
- 13: Three months/13 weeks
- 26: Six months/26 weeks
- 52: One Year/12 months/52 weeks



- 90: Less than one week
- 95: One off/lump sum
- 97: None of these (EXPLAIN IN A NOTE <Ctrl+M>)

Ask **ChkCTC** if **KidBen** = 1, but **WAgeBen** does not = 3

### ? Child Benefit and Child Tax Credit checks

#### ↔ ChkCTC

**INTERVIEWER:** Although the respondent receives Child Benefit he/she hasn't reported receipt of Child Tax Credits. Are you certain that the respondent does not receive Child Tax Credits? This is a means tested benefit so it is plausible the respondent may not receive Child Tax Credits if their income is above a certain threshold.

**If necessary check with the respondent.**

1. Yes, I am certain (the respondent DOES NOT receive Child Tax credits)
2. No, I am not certain (the respondent did not know which Tax Credits received), NODK, NORF

★ **Social Fund** (there is a 12 month reference period for this question)

#### ↔ SocFund

### SHOW CARD H7

**Looking at this card, have you received any of these things in the last 12 months in your own right?**

1. A grant from the Social Fund for funeral expenses
2. A grant from the Social Fund for maternity expenses/Sure Start Maternity Grant
3. A loan or grant from DWP
4. A loan or grant from your local authority
5. None of these
6. (SPONTANEOUS) One or more of these, but don't know which

**INTERVIEWER:** Community Care Grant from the Social Fund – are to help people in particular groups, e.g. elderly or disabled people. They must be eligible for Income Support. Awards are discretionary.

★ **Other Benefit** (there is a 6 month reference period for this question)

#### ↔ OtherBen

### SHOW CARD H8

**Looking at this card, have you received any of these benefits in the last 6 months, in your own right: that is, where you are the named recipient?**

1. 'Extended payment' of Housing Benefit / rent rebate (4 week payment only)
2. Bereavement Payment
3. Lone Parent's Benefit Run-On / Job Grant
4. In-Work Credit
5. Return to Work payment
6. Any National Insurance or State Benefit not mentioned earlier
7. None of these
8. (SPONTANEOUS) One or more of these, but don't know which

⇒ Question Information for other benefit
--

#### Extended Payment of Housing Benefit/ Rent rebate

People who leave benefit because they start work or increase their part-time hours or earnings may be eligible for continuation or run-on of Housing Benefit. They must have been in receipt of JSA(IB) or Income Support for 26 weeks. This extended payment has to be claimed separately from the 'normal' Housing benefit/Council Tax Benefit and is added on as 4 extra weekly payments. It can be received any time over the past 6 months.

#### Bereavement Payment (formerly Widow's Payment)

A lump sum paid immediately after the spouses' death provided that he/she had paid enough NI contributions. As the amount received is a fixed rate (£2000) there is no follow up question asking the amount. In addition, a widow or widower may receive Widowed Parent's Allowance, Bereavement Allowance or Widow's Pension (see earlier question).

#### Child Maintenance Bonus

Child Maintenance Bonus (now phased out and replaced with Child Maintenance Premium) was available to Income Support and JSA (IB) recipients who have a dependant child. They must also have been in receipt of child maintenance for that child. While they were on benefit, they could accrue a bonus up to a maximum of £1000.00. That bonus accrued weekly at the amount of maintenance received to a maximum of £5 per week. The bonus was only payable if and when the customer came off benefit to start full time work.

#### Child Maintenance Premium

Changes in the way that child maintenance is calculated have resulted in Child Maintenance Bonus being phased out when the reforms take effect. For those who are already getting child maintenance, the amount they can receive will build up until they are transferred to the new system. For those who apply after the new system is introduced (or are transferred to the new system), they will be able to keep up to £10 a week of the maintenance paid for their children. This is called Child Maintenance Premium.

#### Lone Parent's Benefit Run-On

The Lone Parent's Benefit Run-On entitles a lone parent who leaves Income Support or Job Seeker's Allowance (Income Based) to go into work to an extra 2 weeks IS. This is provided that the lone parent has been on IS or JSA(IB) continuously for at least 26 weeks, that they have been a lone parent throughout that period, and that the work is for at least 16 hours a week and expected to last for at least 5 weeks.

From 25 October 2004, Lone Parent's Benefit Run-on was replaced by a new Job Grant. This is a tax free payment payable if the person is taking up full time work of at least 16 hours per week. The amount depends on individual circumstances:

- £100 for single people and couples without children
- £250 for all lone parents and couples with children

#### Work-Search Premium

The Work-Search Premium was introduced into 8 pilot areas to help remove the disincentive of the costs of job search. It is available to lone parents who have been on IS or JSA (IB) for 12 months or more, and who agree to search actively for work.

The premium is an award of £20 per week, and is paid in addition to benefit for up to six months of intensive consistent work search activity.

#### In-work Credit

In work credit is available to parents bringing up children alone, who have been getting IS or JSA for at least 52 weeks or more without a break. The credit is a fixed tax free payment of £40 per week (£60 per week in London). It is payable for up to 52 weeks on top of earnings when a parent starts work of at least 16 hours per week and where the work is expected to last for at least 5 weeks.

### Work-related Activity Premium (WRAP)

Provides a £20 per week payment for lone parents for up to six months in addition to income support. WRAP will be made available to those in the 7 pilot areas who have been on qualifying benefits (IS, JSA or IB) for at least 6 months, whose youngest child is aged 11 or over and who engage in some agreed work-related activity. WRAP will replace the existing Work-search Premium (WSP) in April 2007, but WSA is retained as a category at question benefit question 5 as it could be relevant to those receiving this payment in the 6 months prior to April 2007.

### Return to work Credit

Introduced to reward those recipients who come off benefits to return to work. It is a credit worth £40 per week and is paid to those earning up to £15,000 per annum.

### *If 1. Extended payment of Housing Benefit*

#### ☞ Soft Check

It is unusual to receive extended housing benefit. It is only available to claimants who had been on income support, income based jobseeker's allowance, Incapacity benefit or severe disablement allowance and the entitlement ended because the claimant recently started work or increased work hours or pay, in these cases they may be entitled to receive the same amount of housing benefit and/or council tax benefit for up to four weeks after benefits ceased. Check with respondent whether these conditions apply to them. If not do not record the respondent as in receipt of extended housing benefit as housing benefit receipt has already been recorded earlier in the interview.

If respondent insists that extended housing benefit is received record here and the amount and make a note that the respondent does not meet the criteria but insists they receive extended housing benefit.

### *If OtherBen = 6. Any other*

#### ☞ Soft Check

Any National Insurance or State benefit not mentioned earlier' includes:

- Cold Weather payments;
- Earnings Top-Up: being piloted in some areas from October 1996, this may be paid to lower paid people working more than 16 hours a week.
- Reduced Earnings Allowance: this might be paid to a person disabled as a result of an accident at work or an industrial disease before October 1990, if their earning capacity fell as a consequence. The allowance is tax-free.
- One-off payment to people aged 70 or over to help them with living expenses e.g. council tax bills
- any other benefit

Do NOT include the Christmas Bonus paid automatically to recipients of certain benefits in December. It does not need to be recorded anywhere. The name of the benefit should be stated at the text question **Other Name Benefit** below.

### *If OtherBen = 6. Any other*

#### **? Other Name Benefit**

#### **↔ OthName**

**INTERVIEWER:** ENTER THE NAME OF THIS 'OTHER' N.I. OR STATE BENEFIT

#### **☆ Future Claims**

#### **↔ ClaiFut**

**And may I just check, are you awaiting the outcome of a claim for any of the following benefits?**

**SHOWCARD H9**

**INTERVIEWER:** PLEASE SELECT ALL THAT APPLY

1. Pension Credit
2. Universal Credit
3. Housing Benefit
4. Working Tax Credit
5. Child Tax Credit
6. Income Support
7. Jobseeker's Allowance
8. Employment and Support Allowance
9. None of these
10. (SPONTANEOUS) One or more of these, but don't know which

*If WAgeBen = Housing benefit*

**? Housing Benefit amount**

↔ **HBenAmt**

**How much Housing Benefit (or Local Housing Allowance) / rent rebate / allowance are you allowed**

**INTERVIEWER:** Some respondents may receive more housing benefit than the amount of their rent.

0.01...997.00

*If WAgeBen = Housing benefit*

**? Housing Benefit period**

↔ **HBenPd**

**How long does this cover?**

*If WAgeBen = IS OR PenBen = PC*

**? Length of time receiving Income Support/Pension Credit**

↔ **ISWks**

**For how long have you been receiving [Income Support/Pension Credit]?**

**INTERVIEWER:** Please record length of time since respondent started receiving payments, rather than when they first claimed the benefit.

1. Up to 2 years
2. 2 years but less than 3
3. 3 years but less than 4
4. 4 years but less than 5
5. 5 or more years

*If ISWks = 1 ('Up to 2 years') ask the following question*

**? Number of weeks receiving Income Support/Pension Credit**

↔ **ISWks2**

**Please tell me how many weeks you have been receiving [Income Support/Pension Credit]?**

**INTERVIEWER:** If respondent is unsure probe if they can remember the season, significant date or similar that may help recall number of weeks. It is important to get the number of weeks the respondent has been claiming for, the prompt was added to reduce the number of 'don't knows'.

*Ask if receiving benefits at WAgeBen, DisBen, PenBen, KidBen, OtherBen  
The following question will be asked of all those in receipt of benefits*

**? Benefit Letter**

↔ **BenLettr**

**BENEFIT NAME:**

Do you have a letter {or award notice} from the {DWP or Benefits Agency/Pensions part of the DWP/Disability and Carer's Directorate (DCD) or DWP} that you could consult?

*If no letter is consulted:*

? **Bank Statement**

↔ **BankStmt**

[BENEFIT NAME]: ASK OR CODE:

... or is there a bank statement you could consult?

If a letter from the DWP/Benefits Agency/Pensions Service, Award Notice, or a bank statement is consulted, ensure that all benefits shown on it are recorded.

*Ask if receiving benefits at WAgeBen, DisBen, PenBen, KidBen, OtherBen*

The following question will be asked of all those in receipt of benefits

? **Benefit Amount 1**

↔ **BenAmt**

[BENEFIT NAME]:

**How much did you get last time for [benefit name]?**

(IF COMBINED WITH ANOTHER BENEFIT AND UNABLE TO GIVE SEPARATE AMOUNT, ENTER 'Don't Know' FOR BOTH/ALL SUCH BENEFITS)

[IF PENSION CREDIT RECEIVED FOR GUARANTEE CREDIT AND SAVINGS CREDIT ENTER TOTAL RECEIVED HERE]

**INTERVIEWER: Record the FULL amount of benefit actually received not just the amount withdrawn from the account. The amount taken from the account may be only part of the benefit received. If the respondent does not know the actual amount received, code don't know and make a note.**

An amount should only be entered if it is solely for the benefit named on-screen. In cases where two or more benefits are paid in combination, check any documentation and if it lists individual benefit amounts, enter them as appropriate. An Award Notice should itemise in this way. If it is not possible to identify individual amounts, enter 'don't know' for both/all benefits concerned. Never enter a combined benefit amount, i.e. covering more than one benefit coded at **WAgeBen** to **OtherBen**, at any single **Benefit Amount**. If 'dk'.

? **Benefit Period**

↔ **BenPd**

**How long did this cover?**

? **Usual Amount**

↔ **Usual**

**Is that the amount you usually get?**

1. Yes
2. No
3. No such thing as usual amount

*If 2. no*

? **Usual Amount if Unusual**

↔ **BUsAmt**

**How much do you usually get?**

? **Usual Amount Period**

↔ **BUsPd**

**How long does this cover?**

*Additional questions for income support/pension credit and Jobseeker's Allowance*

? **Government Pay**

↔ **GOVPay**

**SHOW CARD J1**

**Are the DWP paying directly for any of the things shown on this card?**

**If yes, which?**

**INTERVIEWER: CODE ALL THAT APPLY**

**THESE ARE PAID FOR BY DEDUCTIONS FROM INCOME SUPPORT/PENSION CREDIT/JOBSEEKER'S ALLOWANCE.**

1. Mortgage interest
2. Rent arrears
3. Fees for nursing home or residential care
4. Gas or electricity bills
5. Service charges for heating or fuel
6. Water charges
7. Council Tax arrears
8. Fines
9. Maintenance payments
10. Personal and commercial loan repayments
11. Yes – but don't know which
12. No – none of these

**? Government Payment Amount**

↔ **GOVAmt**

**How much (in total) is the DWP paying for this/these things?**

**? Government Payment Period**

↔ **GOVPd**

**How long does this cover?**

**? Benefits before or after Government Pay**

↔ **GOVBefor**

**Just now, you said that you got [£amount] Income Support/Pension Credit/Jobseeker's Allowance last time. Was that BEFORE or AFTER taking off what the DWP pay for directly?**

1. BEFORE deducting what DWP pay for directly (i.e. respondent's gross entitlement)
2. AFTER deducting what DWP pay for directly (i.e. net amount received by respondent).

*Additional questions for Social Fund Loans or Community Care Grants:*

**? Social Fund Loan Repayments**

↔ **SFRepay**

**Are you at present making any repayments on any Social Fund loan(s)?**

1. Yes
2. No

**? Social Fund Loan Repayment Amount**

↔ **RePayAmt**

**How much in total do you repay per week?**

**IF REPAYING MORE THAN ONE LOAN, GIVE COMBINED AMOUNT**

**? Benefits Before or After Social Fund Loan Repayments**

↔ **SFInc**

**Just now you said that you got [amount of Income Support/JSA/PC] last time. Was that BEFORE or AFTER taking off your Social Fund loan repayments?**

1. BEFORE taking off amount for loan repayment
2. AFTER taking off amount for loan repayment

*Additional questions for PIP / DLA / AA*

**? Who Receives PIP/ DLA/ Attendance Allowance**

↔ **WhoRec**

**Who (do you/will you) receive it for?**

**IF CURRENT HOUSEHOLD MEMBER, ENTER PERSON NUMBER(S). OTHERWISE ENTER 97.**

This may be multi-coded if the respondent receives both for himself and someone else. For adults in receipt of Disability Living Allowance self-care component the following question is asked:

*If DisBen = AA*

**? Receiving Carer's Allowance**

↔ **GetCA**

**ASK OR CODE: Is there anyone getting Invalid Care Allowance/Carer's Allowance for looking after you?**

Include another household member or someone outside the household. The previous question will also appear later if a person is in receipt of attendance allowance.

**? Made-Up Pay from Employer**

↔ **MadEmp**

**Are you getting 'made up pay' from your employer in addition to the Incapacity Benefit you are receiving?**

*If yes:*

**? Made-Up Pay Weekly**

↔ **MduPwk**

**Are you getting 'made-up' pay [READ OUT(RUNNING PROMPT)]**

1. every week from your employer
2. or only some weeks?

*If only some weeks:*

**? Number of Weeks Receive Made-Up Pay**

↔ **MduPNo**

**For how many weeks are you getting 'made-up' pay?**

*If PenBen = 1:*

**? Pension Credit Element Received**

↔ **PComp**

**PENSION CREDIT**

**INTERVIEWER:** ASK RESPONDENT TO CONSULT AWARD NOTICE TO SEE IF GUARANTEE CREDIT AND SAVINGS CREDIT BEING RECEIVED.

CODE ALL THAT APPLY

1. GUARANTEED ELEMENT RECEIVED (See Section titled 'His/Her Guarantee Credit')
2. SAVINGS ELEMENT RECEIVED (See Section titled 'His/Her Saving Credit')

**? Pension Credit Guaranteed Element**

↔ **PCmpAmtG**

**And what is the amount received for the guaranteed element?**

**INTERVIEWER:** ENTER AMOUNT FROM AWARD NOTICE RECEIVED FOR THE GUARANTEED ELEMENT

## ? Pension Credit Savings Element

↔ PCmpAmtS

**And what is the amount received for the savings element?**

**INTERVIEWER:** ENTER AMOUNT FROM AWARD NOTICE RECEIVED FOR THE GUARANTEED ELEMENT

If Pcomp is Coded 1-2 and the follow-up questions PCmpAmtG and PCmpAmtS are coded 'Don't Know' the following soft check will appear.

The award notice is made up of a number of pages. The section of the award notice entitled 'How pension credit has been worked out' gives the breakdown of the components of the pension (see your training pack for an example). Respondents may have only kept the first page of the award notice and therefore only know the total amount of benefit received as the subsequent pages may have been thrown away. If this is the case, please suppress the check and leave a note to explain why you are unable to give a breakdown.

### ☞ Soft check

Respondent is consulting award notice but cannot give the breakdown of components. Please check ALL pages of award notice and look out for section titled "How pension credit has been worked out" to find the breakdown. If respondent has only kept first page, please make a note.

*If the amounts recorded in Pension Credit Guaranteed Element AND Pension Credit Savings Element do not equate to the total amount of Pension Credit received*

### ☞ Soft check

The Savings and Guarantee elements of pension credit should add to make the total amount of PC received.

**INTERVIEWER:** If the amounts cannot be reconciled make a note to explain the circumstances.

*If SocFund = 3. Social Fund Loan or Community Care Grant*

## ? Social Fund Loan or Grant

↔ SFTType

**Thinking about the money you received from the Social Fund, was that a loan, or a grant? IF BOTH, CODE 1 AND 2.**

1. loan
2. grant

*If a grant:*

## ? Number of Social Fund Grants

↔ SFGrNum

**How many such grants have you had in the past 12 months?**

## ? Total Amount of Social Fund Grants

↔ SFGrAmt

**About how much did you receive altogether?**

*If a loan:*

## ? Type of Social Fund Loan

↔ SFLnType

**Was it a Budgeting loan or a Crisis loan/ Short Term Advance?  
IF BOTH CODE 1 AND 2**



Interviewer note: Short Term Advances are replacing Crisis Loan Alignment Payments from 2013 and is administered by DWP. Crisis Loans for general living expenses are administered by local authorities or devolved administrations from 2013.

**? Number of Social Fund Loans**

↔ LoanNum

[TYPE OF LOAN]

How many such loans have you had in the past 6 months?

**? Social Fund Loan Amount**

↔ LoanAmt

[TYPE OF LOAN]

About how much did you borrow (altogether)?

If more than one loan of the same type, enter total.

*If OtherBen = 1:*

**? Extended Benefit Amount**

↔ ExBenAmt

HB EXTENDED PAYMENT

How much was the extended payment?

Enter the lump sum payment covering 4 weeks.

*If OtherBen = 1:*

**? Extended Benefit period**

↔ ExBenPd

HB EXTENDED PAYMENT PERIOD

How long did this cover

*If Widow / bereavement payment:*

**? Widow's payment amount**

↔ WidPAmt

How much did you receive for your widow's/ bereavement payment?

*If other named benefit (at OtherBen):*

**? Other Benefits at Present**

↔ OthPres

Are you receiving (...THIS BENEFIT...) at present?

**? Number of Weeks Received Benefit 1**

↔ OthWeeks

For how many weeks in the last 6 months have you received (THIS BENEFIT)?

*If reported receiving a benefit at WAgeBen – OtherBen, but not sure which benefit this was:*

**? Other benefit name**

↔ OBName

INTERVIEWER: Enter the details of other benefits received but not sure which

*If reported receiving a benefit at WAgeBen – OtherBen, but not sure which benefit this was:*

**? Other benefit amount**

↔ **OBBenAmt**

**How much did you get last time?**

**INTERVIEWER:** Enter the value of other benefits received but not sure which

*If reported receiving a benefit at WAgeBen – OtherBen, but not sure which benefit this was:*

**? Other benefit period**

↔ **OBBenPd**

**How long did this cover?**

*If WAgeBen DOES NOT = 3 Working Tax Credit or 4 Child Tax Credit or 1 Universal Credit*

**? Ever Received Tax Credit**

↔ **TCEver**

**Showcard H10**

**Have you received any tax credit payments since April 2003 (when Working Tax Credit and Child Tax Credit were introduced)?**

**INTERVIEWER:** We are only interested in Working Tax Credit and Child Tax Credit at this question.

Exclude Working Families' Tax Credit, Disabled Person's Tax Credit and Children's Tax Credit which were replaced from April 2003 by Working Tax Credit and Child Tax Credit.

1. Working Tax Credit (excluding any childcare element of Working Tax Credit)
2. Child Tax Credit (including any childcare element of Working Tax Credit)
3. None of these

*If Ever Received Tax Credit =1 or =2*

**? Tax Credit This Year**

↔ **TCThsYr**

**Showcard H10**

**Have you received any tax credit payments since April [autofill survey year]?**

1. Working Tax Credit (excluding any childcare element of Working Tax Credit)
2. Child Tax Credit (including any childcare element of Working Tax Credit)
3. None of these

*If the respondent is not getting tax credits at the moment, but did last financial year or in a previous year:*

**? Tax Credit Repayment**

↔ **TCRepay**

**Why are you not receiving any tax credit payments at the moment?**

1. Repaying an overpayment from earlier this year
2. Repaying an overpayment from previous year
3. Not completed application / renewal forms
4. Income too high
5. Not eligible for other reason
6. Other

*If respondent has answered DK to nay of the benefit amount questions the following is asked:*

**? Total benefit amount**

↔ **TtBPrx**

Thinking about all the [benefits] you receive, approximately how much would you say you receive from these sources per week?

**INTERVIEWER:** An approximate figure to the nearest pound is acceptable at this question. Only an estimate is needed.

**INTERVIEWER:** Do not refer back to or change benefit amounts already provided.

**INTERVIEWER:** If the respondent cannot arrive at a figure immediately code as 'Don't know. If necessary, explain to the respondent that this question will give the DWP added confidence in the tax credits and benefit amounts already provided.  
: 0.00..99997.00

### ? Benefit Question 7

↔ Ben7Q

#### SHOWCARD J2

**In the last 12 months (that is since [date]), have you received any regular payments from any of these insurance schemes?**

1. Unemployment/redundancy insurance
2. Trade Union sick pay or strike pay
3. Private medical scheme
4. Personal accident insurance
5. Permanent health insurance
6. Hospital savings scheme
7. Friendly society sickness benefit
8. Critical Illness Cover
9. Any other sickness insurance
10. None of these

The interest here is in regular income from an insurance policy, in the event of change in employment status or health, rather than, for example, to pay for medical treatment/expenses. One off / lump sum payments should be excluded.

Code 1 covers any income from an insurance policy which provides benefits in the event of loss of earnings due to redundancy or unemployment.

### Income from pensions, trust, royalties and allowances

**Redtax** has been adjusted so that interviewers are now able to enter £0.00 where the respondent is not eligible to pay any tax on their redundancy payment.

Changed 

? Amount of tax

↔ Redtax

**How much tax was paid on the redundancy payment?**

:0.00 - 999997.00

### Adult and child social material deprivation

A number of new questions have been added those exploring working and pension age material deprivation.

Added 

Working age respondents are now also asked the following:

☆ All weather shoes

↔ EUShoe

SHOWCARD M3/M1

**Do [you/you and your partner] have...**

**...two pairs of properly fitting shoes, including a pair of all weather shoes, for yourself and [partner's name]?**

1. We have this
2. We would like to have this but cannot afford this at the moment
3. We do not want / need this at the moment
4. [Does not apply]

☆ **Replace worn-out clothes**

↔ **EUClothes**

**SHOWCARD M3/M1**

**Do [you/you and your partner] ...**

**...replace worn-out clothes with new ones?**

1. We have this
2. We would like to have this but cannot afford this at the moment
3. We do not want / need this at the moment
4. [Does not apply]

☆ **Get together with friends**

↔ **EUMeal**

**SHOWCARD M3/M1**

**Do [you/you and your partner]...**

**...get together with friends or family around for a drink or meal at least once a month?**

1. We have this
2. We would like to have this but cannot afford this at the moment
3. We do not want / need this at the moment
4. [Does not apply]

☆ **Participates in a hobby**

↔ **EUAdLes**

**SHOWCARD M3/M1**

**And do you regularly participate in a hobby or leisure activity?**

1. I have this
2. I would like to have this but cannot afford this at the moment
3. I do not want / need this at the moment
4. [Does not apply]

☆ **Have internet access**

↔ **EUInternet**

**SHOWCARD M3/M1**

**Do [you/you and your partner]...**

**...have internet access for personal use?**

**INTERVIEWER: Internet access can be via desktop computers, smartphone, other wireless handheld devices (such as tablets), video games consoles, TV etc.**

1. I have this
2. I would like to have this but cannot afford this at the moment
3. I do not want / need this at the moment
4. [Does not apply]

And pension age respondents are now also asked:



☆ All-weather shoes

↔ EUShoeOA

**Do you have two pairs of properly fitting shoes, including a pair of all weather shoes?**

1. Yes
2. No

*If EUShoeOA= 2 (no)*

☆ Why not all weather shoes

↔ EUShoeNt

**SHOWCARD M9**

**Why do you not have two pairs of properly fitting shoes, including a pair of all weather shoes?**

CODE ALL THAT APPLY

1. I do not have the money for this
2. This is not a priority for me on my current income
3. My health / disability prevents me
4. It is too much trouble / too tiring
5. There is no one to do this with or help me
6. This is not something I want
7. It is not relevant to me
8. Other reason
9. Do not know

☆ Replace worn-out clothes

↔ EUClothesOA

**Do you replace worn-out clothes with new ones?**

1. Yes
2. No

**INTERVIEWER:** If the clothes are replaced by second hand ones, code no.

*If EUClothesOA= 2 (no)*

☆ Why can't replace clothes

↔ EUClothesNt

**SHOWCARD M9**

**Why can you not replace worn-out clothes with new ones?**

CODE ALL THAT APPLY

1. I do not have the money for this
2. This is not a priority for me on my current income
3. My health / disability prevents me
4. It is too much trouble / too tiring
5. There is no one to do this with or help me
6. This is not something I want
7. It is not relevant to me
8. Other reason
9. Do not know

☆ Participates in hobby

↔ EUAdLesOA

**Do you regularly participate in a hobby or leisure activity?**

1. Yes
2. No

If EUAdLesOA= 2 (no)

★ **Why can't participate in a hobby**

↔ **EUAdLesNt**

**SHOWCARD M9**

**Why can you not regularly participate in a hobby or leisure activity?**

CODE ALL THAT APPLY

1. I do not have the money for this
2. This is not a priority for me on my current income
3. My health / disability prevents me
4. It is too much trouble / too tiring
5. There is no one to do this with or help me
6. This is not something I want
7. It is not relevant to me
8. Other reason
9. Do not know

★ **Replace furniture**

↔ **OAFur**

**Do you replace any worn out furniture?**

1. Yes
2. No

If OAFur= 2 (no)

★ **Why can't replace furniture**

↔ **FurNt**

**SHOWCARD M9**

**Why can you not replace any worn out furniture?**

CODE ALL THAT APPLY

1. I do not have the money for this
2. This is not a priority for me on my current income
3. My health / disability prevents me
4. It is too much trouble / too tiring
5. There is no one to do this with or help me
6. This is not something I want
7. It is not relevant to me
8. Other reason
9. Do not know

★ **Internet access**

↔ **OAIInternet**

**Do you have internet access for personal use?**

**INTERVIEWER:** Internet access can be via desktop computers, smartphone, other wireless handheld devices (such as tablets), video games consoles, TV etc.

1. Yes
2. No

If OAIInternet = 2 'No'

☆ **Why no internet access**

↪ InternetNT

**SHOWCARD M9**

**Why don't you have internet access for personal use? Is that because you...**

1. I do not have the money for this
2. This is not a priority for me on my current income
3. My health / disability prevents me
4. It is too much trouble / too tiring
5. There is no one to do this with or help me
6. This is not something I want
7. It is not relevant to me
8. Other reason
9. Do not know

☆ **Money to spend on self**

↪ OADep2

**(On a slightly different note) do you have a small amount of money to spend each week on yourself (not on your family)?**

1. Yes
2. No

If OADep2 = 2 'No'

☆ **Why no money to spend on self**

↪ OADep2Nt

**SHOWCARD M9**

**Why do you not have a small amount of money to spend each week on yourself?**

CODE ALL THAT APPLY

1. I do not have the money for this
2. This is not a priority for me on my current income
3. My health / disability prevents me
4. It is too much trouble / too tiring
5. There is no one to do this with or help me
6. This is not something I want
7. It is not relevant to me
8. Other reason
9. Do not know

If OADep2Nt = 3 OR 4 OR 5

☞ Soft check

**INTERVIEWER:** Please confirm the respondent understands that they are being asked about the reason they don't have money to spend on themselves. If the answer remains unchanged, please explain in a note.

One of the answer categories in the question **Debt (and DebtArrear)** has been updated to better reflect the types of consumer goods people might buy on hire purchase, or rent.



### ? Up-to-date with Bills

↔ Debt

**I am now going to ask you about paying bills for things like electricity, gas, and water rates.**

**SHOWCARD M7**

**Sometimes people are not able to pay every bill when it falls due. May I ask, are you up-to-date with the bills on the card, or are you behind with any of them?**

**INTERVIEWER: 'Which others' UNTIL 'No others'**

1. Behind with the electricity bill
2. Behind with the gas bill
3. Behind with other fuel bills like coal or oil
4. Behind with Council Tax
5. Behind with insurance policies
6. Behind with telephone bill
7. Behind with television / DVD player rental or HP
8. Behind with other HP payments
9. Behind with water rates
10. Behind with rent
11. Behind with mortgage payments
12. Behind with other loans
13. Not behind with any of these

### Adults' saving and investments

Small changes have been made to the answer categories at Accounts to update them to reflect changes in the way National Savings accounts are administered.

### ? Type of Accounts

↔ Accounts

**SHOW CARD N1**

**Which of these accounts do you have now, or have you had in the last 12 months?**

**INTERVIEWER:** If respondent has an internet or telephone account but type of account is not known ask respondent what they predominantly use their account for to establish whether it is a current account or savings account.

See helpscreen for definitions of accounts.

1. Current account with a bank, building society, supermarket/store or other organisation
2. Basic Bank Accounts including introductory/ starter accounts (including internet and telephone banking)
3. Post Office card accounts
4. *National Savings Bank - Direct Saver (including internet and telephone banking)*
5. *National Savings Bank - Investment Account (including postal banking)*
6. ISA (Individual Savings Account) (including internet and telephone banking)
7. Savings account, investment account/bond, any other account with a bank, building society, supermarket/store or other organisation (including internet and telephone banking)
8. Credit Union
9. Internet or telephone banking – type of account not known
10. None of these



## Well-being

A new suite of well-being questions have been included in the 2013-14 questionnaire. They belong to one of the ad-hoc modules for EU-SILC, so will only be included for one year. The aim of these questions is to measure people's quality of life as well as their trust in national institutions (i.e. the political system). The UK results collected via FRS will then be compared with those of other European countries.

**The questions are only to be asked at a person level - never by proxy.**

It is important to note that these are opinion questions. The respondent can answer opinion questions however they wish: we are not trying to push them into a particular area of interest. It is therefore very important that the interviewer does not try to influence the respondent in any way.

A few general points on asking opinion questions:

- If the respondent is having difficulty answering questions and is embarrassed or worried about this, you need to stress that there is no right or wrong answer, you are interested in what they do know or think. You can always deal with this by sympathising and saying you would also find the questions difficult
- You may be asked what the correct answer is on an opinion question. You need to handle this situation with great care as you must never give an answer during the interview. You may have to say that you are not sure or do not know; 'I'm not an expert' is always a good phrase to use
- If the respondent replies to an opinion question by asking 'what do you mean?' you should never try to explain what it means. If the respondent does not understand the question, you should repeat the question once, exactly as it is written. If after repeating the question once the respondent still cannot answer it, you should enter "don't know", make a note and move on. Try not to paraphrase the question as this may have an unintended effect on the respondent's answer.
- A lot of the well-being questions need to be answered on a scale of 0 (nought) to 10. It is important to stress that the scale starts at nought, as it is easy for respondents to incorrectly assume that the scale runs from 1 to 10.
- These questions are only to be asked during personal interviews, never by proxy.



The following questions have all been added to this year's questionnaire.

### ☆ Introduction to EU well-being questions

#### ↔ IntroWB

**Next I would like to ask you some questions about your feelings on aspects of your life. There are no right or wrong answers. For each of these questions I'd like you to give an answer on a scale of nought to 10, where nought is 'not at all' and 10 is 'completely'**

**INTERVIEWER:** All well-being questions are to be asked of all adult household members. They cannot be answered by proxy

☆ **Overall life satisfaction**

↔ **EULifeSat**

**Overall, how satisfied are you with your life nowadays?**

Where nought is 'not at all satisfied' and 10 is 'completely satisfied'

**INTERVIEWER:** This question is intended to capture a respondent's own assessment of their life as a whole (i.e. all the different aspects).

☆ **Satisfaction with financial situation**

↔ **EUMoneySat**

**Overall, how satisfied are you with the financial situation of your household?**

Where nought is 'not at all satisfied' and 10 is 'completely satisfied'

**INTERVIEWER:** This question is intended to capture a respondent's own assessment of their household's financial situation (taking account of income adequacy, savings, ability to pay back debt).

☆ **Satisfaction with accommodation**

↔ **EUAccmSat**

**Overall, how satisfied are you with your accommodation?**

Where nought is 'not at all satisfied' and 10 is 'completely satisfied'

**INTERVIEWER:** This question is intended to capture a respondent's own feelings about their accommodation in terms of whether it meets the household's needs, which might include: affordability, adequacy of space, the surrounding neighbourhood, distance from work, build quality.

☆ **Satisfaction with job**

↔ **EUJobSat**

**Overall, how satisfied are you with your present job?**

From nought (Not at all satisfied) to 10 (Completely satisfied)

**INTERVIEWER:** This question is intended to capture a respondent's own feelings about their current job. If the respondent has more than one job they should refer to their main job.

*If SelfDEmp 1-4*

☆ **Satisfaction with commuting time**

↔ **EUCommuSat**

**Overall, how satisfied are you with the time it takes you to travel to and from your place of work?**

Where nought is 'not at all satisfied' and 10 is 'completely satisfied'

97 = works from home

**INTERVIEWER:** This question is intended to capture a respondent's own feelings about their commuting time, at a particular point in time (current situation). If the respondent has more than one job they should refer to their main job.

*If SelfDEmp 1-4*

☆ **Satisfaction with time use**

↔ **EUTimeSat**

**Overall, how satisfied are you with the amount of time you have to do things you like doing?**

Where nought is 'not at all satisfied' and 10 is 'completely satisfied'

**INTERVIEWER:** This question is intended to capture a respondent's own feelings about their time use.

☆ **Satisfaction with personal relationships**

↔ **EURelaSat**

**Overall, how satisfied are you with your personal relationships?**

Where nought is 'not at all satisfied' and 10 is 'completely satisfied'

**INTERVIEWER:** This question is intended to capture a respondent's own feelings about their relationships (with relatives, friends, colleagues etc.).

☆ **Satisfaction with recreational or green areas**

↔ **EURecSat**

**Overall, how satisfied are you with the recreational or green areas in the place where you live?**

Where nought is 'not at all satisfied' and 10 is 'completely satisfied'

**INTERVIEWER:** This question is intended to capture a respondent's own feelings about the recreational or green areas in the place where they live. The question refers to the area around the place of residence (where the respondent usually goes shopping, goes for a walk, walks home etc.). 'Recreational or green areas' refer to places the respondent can walk, cycle etc.

☆ **Satisfaction with living environment**

↔ **EUEnvirSat**

**Overall, how satisfied are you with the quality of your living environment?**

Where nought is 'not at all satisfied' and 10 is 'completely satisfied'

**INTERVIEWER:** This question is intended to capture a respondent's own feelings about their living environment. The question refers to access to services (e.g. shops, public transport etc.), the presence of cinema, museums, theatres, etc in the place where the respondent lives.

☆ **Meaning of life**

↔ **EU Meaning**

**Overall, to what extent do you feel that the things you do in your life are worthwhile?**

Where nought is 'not at all worthwhile' and 10 is 'completely worthwhile'

**INTERVIEWER:** This question is intended to capture a respondent's own assessment of what makes his/her life and existence feel important and meaningful.

☆ **Being very nervous**

↔ **EUNervous**

**How much of the time over the past four weeks have you been very nervous?**

1. All of the time
2. Most of the time
3. Some of the time
4. A little of the time
5. None of the time
6. (Spontaneous) Don't know

**INTERVIEWER:** Being nervous means showing emotional tension, restlessness, agitation, etc.

☆ **Feeling down in the dumps**

↔ **EUDown**

**How much of the time over the past four weeks have you felt so down in the dumps that nothing could cheer you up?**

1. All of the time
2. Most of the time
3. Some of the time
4. A little of the time
5. None of the time
6. (Spontaneous) Don't know

☆ **Feeling calm and peaceful**

↔ **EUCalm**

**How much of the time over the past four weeks have you felt calm and peaceful?**

1. All of the time
2. Most of the time
3. Some of the time
4. A little of the time
5. None of the time
6. (Spontaneous) Don't know

☆ **Feeling downhearted and depressed**

↔ **EUDepress**

**How much of the time over the past four weeks have you felt downhearted and depressed?**

1. All of the time
2. Most of the time
3. Some of the time
4. A little of the time
5. None of the time
6. (Spontaneous) Don't know

☆ **Being happy**

↔ **EUHappy**

**How much of the time over the past four weeks have you been happy?**

1. All of the time
2. Most of the time
3. Some of the time
4. A little of the time
5. None of the time
6. (Spontaneous) Don't know

☆ **Personal matters (anyone to discuss with)**

↔ **EUDiscuss**

**Do you have anyone to discuss personal matters with?**

1. Yes
2. No
3. (Spontaneous) Don't know

**INTERVIEWER:** This question means that the respondent has at least one person they can discuss personal matters with, regardless of whether they currently need this.

☆ **Help from others**

↔ **EUHelp**

**Do you have any relatives, friends or neighbours that you can ask for help?**

1. Yes
2. No
3. (Spontaneous) Don't know
4. (Spontaneous) No friends, relatives or neighbours

**INTERVIEWER:** This question means that the respondent has at least one person (relative, friend or neighbour), they can ask for any kind of help: material, financial, practical, moral, regardless of current need. Only relatives and friends who don't live in the same household as the respondent should be considered.

☆ **Physical security**

↔ **EUSafe**

**How safe do you feel walking alone in your area after dark?**

1. Very safe
2. Fairly safe
3. A bit unsafe
4. Very unsafe
5. (Spontaneous) Don't know

**INTERVIEWER:** This question refers to the area around the place of residence (where the respondent usually goes shopping, goes for a walk, walks home etc.).

☆ **Trust in others**

↔ **EUOthTrust**

**Would you say that most people can be trusted? Please answer on a scale from nought to 10, where nought means that in general you do not trust any other person and 10 that you feel most people can be trusted.**

: 0..10

☆ **Trust in the political system**

↔ **EUPoltTrus**

**How much do you personally trust each of the following national institutions... Please answer on a scale from nought to 10, where nought means no trust at all and 10 means complete trust.**

**... The political system?**

From nought (No trust at all) to 10 (Complete trust)

**INTERVIEWER:** The term 'political system' refers to a complete set of institutions (the Cabinet, House of Commons) and interest groups (the political parties, trade unions etc.).

☆ **Trust in the legal system**

↔ **EULegITrust**

... **The legal system?**

From nought (No trust at all) to 10 (Complete trust)

**INTERVIEWER:** The term 'legal system' refers to the entire system for making and enforcing the law and not to a specific legal entity. Trust in the legal system is supposed to measure, for example, how effective, efficient and fair the respondent thinks the legal system is (e.g. the courts).

☆ **Trust in the police**

↔ **EUCopTrust**

“... **The police?**”

From nought (No trust at all) to 10 (Complete trust)

**INTERVIEWER:** The term 'police' refers to the institution rather than individuals.

## Details of changes to show cards

2013-2014	2012-2013	Question name	Source code file	ACTION
A1	A1	'TypeEd'	<i>HHGrid</i>	KEEP
A2	A2	'Natld' 'NINatID'	<i>Ethnic</i>	KEEP
A3	A3	'EthGrp'	<i>Ethnic</i>	KEEP
A3A	A3A	'EthgrpS'	<i>Ethnic</i>	KEEP
A4	A4	'SIDQn'	<i>Ethnic</i>	KEEP
A5	A5	'SIDQn'	<i>Ethnic</i>	KEEP
A6	A6	'SIDQn'	<i>Ethnic</i>	KEEP
A7	A7	'SIDQn'	<i>Ethnic</i>	KEEP
A8	A8	'SIDQn'	<i>Ethnic</i>	KEEP
A9	A9	'SIDQn'	<i>Ethnic</i>	KEEP
A10	A10	'SIDQn'	<i>Ethnic</i>	KEEP
A11	A11	'ReligEnW'	<i>Ethnic</i>	KEEP
A12	A12	'ReligSc'	<i>Ethnic</i>	KEEP
A13	A13	'Reason'	<i>Trail</i>	KEEP
B1	B1	'Tenure'	<i>owns1 address.</i>	KEEP
B2	B2	'Landlord'	<i>rents</i>	KEEP
B3	B3	'TenType'	<i>rents</i>	KEEP
B4	B4	'OthType'	<i>rents</i>	KEEP
B5	B5	'RMPur'	<i>owns1</i>	KEEP
B6	B6	'MortType'	<i>owns1</i>	KEEP
B7	B7	'EndwPrin'	<i>owns1</i>	KEEP
B8	B8	'MorAll'	<i>owns1</i>	KEEP
B9	B9	'MorAll'	<i>owns1</i>	KEEP
B10	B10	'SerInc'	<i>rents</i>	KEEP
B11	B11	'OthPur'	<i>owns1</i>	KEEP
B12	B12	'CTDisc' 'CT25D50D'	<i>countax</i>	KEEP
B13	B13	'Charge'	<i>owns2</i>	KEEP
C1	C1	'Chatt'	<i>chcare</i>	KEEP
C2	C2	'ChPeo'	<i>chcare</i>	KEEP
D1	D1	'NeedHelp', 'GiveHelp'	<i>qcare</i>	KEEP
D2	D2	'Hour'	<i>qcarer</i>	KEEP
E1	E1	'DisL' 'CDisL'	<i>ihealth</i>	KEEP
E2	E2	'Rstrct'	<i>ihealth</i>	KEEP
F1	F1	'HiQual3' 'CurQual'	<i>ieducq icurst</i>	KEEP
F2	F2	'HiQual3' 'CurQual'	<i>ieducq icurst</i>	KEEP
F3	F3	'Train' 'NITrain'	<i>icurst</i>	KEEP
F4	F6	'RetReas'	<i>icurst</i>	MOVED
-	F5	'NewDtype'	<del><i>icurst</i></del>	REMOVED
G1	G1	'EType'	<i>ijobdes</i>	KEEP
G2	G1A	'YJbChnge'	<i>jobdes</i>	NUMBER CHANGE
G3	F4	'SelfDemp' 'SelfDEmpmon'	<i>Icurst</i>	MOVED

2013-2014	2012-2013	Question name	Source code file	ACTION
		th12' – 'SelfDEmpmon th1'		
G4	G2	'InclPay', 'InclPay1'	<i>iempjob</i>	MOVED
G5	G3	'HHInc'	<i>iempjob</i>	MOVED
G6 (parts 1 and 2)	G4 (parts 1 and 2)	'ExpBen'	<i>iempjob</i>	MOVED
G7	G5	'CarVal'	<i>iempjob</i>	MOVED
G8	G6	'OwnSum'	<i>iselfjob</i>	MOVED
H1	-	'WAgeBen'	<i>benblock</i>	NEW CARD
H2	H2	'WTCLum'	<i>benblock</i>	KEEP
H3	H3	'CTCLum'	<i>benblock</i>	KEEP
H4	-	'DisBen'	<i>benblock</i>	NEW CARD
H5	-	'PenBen'	<i>benblock</i>	NEW CARD
H6	-	'KidBen'	<i>benblock</i>	NEW CARD
H7	-	'SocFund'	<i>benblock</i>	NEW CARD
H8	-	'OtherBen'	<i>benblock</i>	NEW CARD
H9	-	'ClaiFut'	<i>benblock</i>	NEW CARD
H10	H1	'TCEver' 'TCThsYr'	<i>benblock</i>	MOVED
J1	J1	'GOVPay' 'NIGovPay'	<i>benblock</i>	KEEP
J2	J2	'Ben7Q'	<i>ibenef4</i>	KEEP
K1	K1	'AnyPen'	<i>iothinc1</i>	KEEP
K2	K2	'Royal'	<i>iothinc1</i>	KEEP
K3	K3	'PropRent'	<i>iothinc1</i>	KEEP
K4	K4	'MntRec'	<i>iothinc2</i>	KEEP
K5	K5	'MntArr'	<i>iothinc2</i>	KEEP
K6	K5A	'MrArr'	<i>iothinc2</i>	NUMBER CHANGE
K7	K6	'Allow'	<i>iothinc2</i>	NUMBER CHANGE
K8	K7	'OddJob'	<i>iothinc2</i>	NUMBER CHANGE
L1	L1	'EmpPen'	<i>ipension</i>	KEEP
L2	L2	'EmpArr'	<i>ipension</i>	KEEP
L3	L3	'EPLong' 'PPDat' 'SPDat'	<i>ipension</i>	KEEP
L4	L4	'EpType'	<i>ipension</i>	KEEP
M1	M1	'AddHol' 'AdDDec' 'AdDIns' 'AfDep2' 'EUShoe' 'EUClothes' 'EUDrink' 'EUAdLes' 'EUInternet'	<i>afford</i>	KEEP (now applies to additional variables)
M2	M2	'AdDMon' 'AdepFur' 'Af1'	<i>afford</i>	KEEP
M3	M3	'AddHol' 'AdDDec' 'AdDIns' 'AfDep2' 'EUShoe'	<i>afford</i>	KEEP



2013-2014	2012-2013	Question name	Source code file	ACTION
		'EUClothes' 'EUDrink' 'EUAdLes' 'EUInternet'		
M4	M4	'AdDmon' 'AdepFur' 'Af1'	<i>afford</i>	KEEP
M5	M5	'CDepHol' 'CDepBed' 'CDepEqp' 'CDepCel' 'CDpCoat' 'CDepVeg'	<i>afford</i>	KEEP
M5	M6	'CDepAct' 'CDepLes' 'CDepTea' 'CPlay' 'CDepTrp'	<i>afford</i>	KEEP
M7	M7	'Debt'	<i>afford</i>	KEEP
M8	M8	'OAHowPy'	<i>afford</i>	KEEP
M9	M9	'EUTelephone OAWhy' 'EUCarOAWhy' 'EUShoeNt' 'EUClothesNt' 'EUAdLesNt' 'FurNt' <b>'InternetNT'</b> <b>'OADep2Nt'</b> 'MealNt' 'OutNt' 'FrndNt' 'HoINt' 'CookNt' 'HomeNt' 'HeatNt' 'DampNt' 'WarmNt' 'BillNt' 'PhonNt' 'TaxiNt' 'HairNt' 'CoatNt'	<i>afford</i>	KEEP
N1	N1	'Accounts'	<i>iadint</i>	KEEP
N2	N2	'Invests'	<i>iadint</i>	KEEP
N3 Part1 & Part2	N3 Part1 & Part2	'OfInvA'	<i>iadint</i>	KEEP
N4	N4	'Totsave'	<i>ichint</i>	KEEP
N5	N5	'TotSav'	<i>isave</i>	KEEP
N6	N6	'CBAAmt'	<i>isave</i>	KEEP
N7	N7	'NSAmt'	<i>isave</i>	KEEP