



# Living Costs and Food Survey

Volume C:

The Income Questionnaire User Guide

April 2015 – March 2016

Great Britain and Northern Ireland

ONS Social Surveys

Office for National Statistics

March 2017

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Tel: +44 (0)20 8876 3444

Email: [psi@nationalarchives.gsi.gov.uk](mailto:psi@nationalarchives.gsi.gov.uk)

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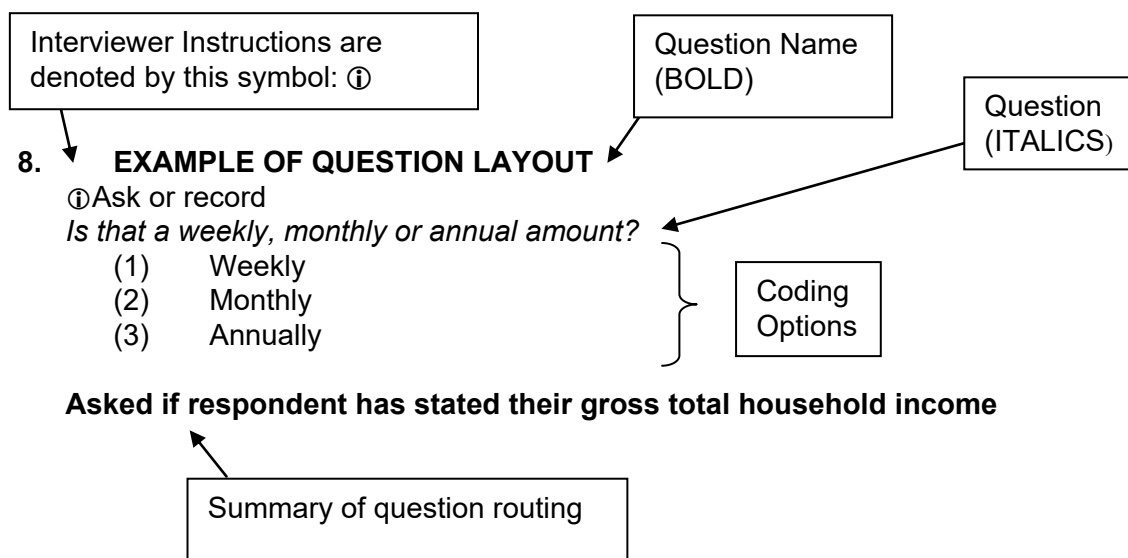
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**If you have any queries relating to the 2015-16 LCF database please contact the customer response team on 01633 45 5678 or [socialsurveys@ons.gov.uk](mailto:socialsurveys@ons.gov.uk)**

## QUESTION LAYOUT AND CONVENTIONS

All questions in the questionnaire specification are laid out using the same format.

### Example of question layout



### Conventions

The appearance of an asterisk before a question name indicates that the variable is not present in the anonymised datasets or included in an anonymised format.

Derived variables that are calculated within the questionnaire are denoted by names beginning with DV. For example, *DvTax1* is a derived variable for *PyTax* and calculates the average weekly amount of income tax deducted from the respondent's wage/salary.

The appearance of brackets in the wording of a question denotes a form of text substitution (alternative question wording depending upon the respondent's earlier answers) carried out either by BLAISE computer package or else by the interviewer, during the questionnaire.

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## USE OF THE 2015-16 USER DOCUMENTATION

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Explanatory notes on the use of the volumes of the documentation are given in each volume. The following gives a summary only. See 'Definitions' (page 29)

### **Volume A – Introduction**

*Guide to the 2015-16 User Documentation* - This volume begins with a guide to the contents and the use of the User Documentation

*The structure of the 2015-16 database* – This section of the volume outlines the different parts of the database and includes a useful flow diagram which gives a pictorial summary of the database structure.

Database definitions - Provides definitions of the terms used both on the flow diagram and in other parts of the documentation.

### **Volume B – Household Questionnaire**

The first part of the LCF questionnaire collects information about households; that is to say that the majority of the questions are asked at a household-level, with the household reference person typically responding on behalf of the household as a whole. The household questionnaire includes questions on a range of subjects which are of interest to the survey's users, including family relationships, ethnicity, employment details and the ownership of household durables. It is also the source of all expenditure information not recorded in the diary; principally that which concerns regular payments typically made by all households and large, infrequently purchased items such as vehicles, package holidays and home improvements.

### **Volume C – Income Questionnaire**

The income questionnaire follows on immediately from the household questionnaire and collects the key person-level variables used on the survey. The principal components of the LCF income questionnaire are the sections covering income from employment, benefits and assets. These together form an overview of the total income received by each household, as well as each household member individually.

Volumes B and C outline the questions exactly as they appear within the computer-assisted personal interviewing (CAPI) program and are then asked in the LCF interview. The Blaise program ensures that the correct questionnaire routing is followed through the interview and applies range and consistency error checks where necessary. The Blaise-code and translated routing for each individual question in the household and income questionnaires are shown in Volume B and C respectively. This can be used to both trace the conditions under which a particular question or set of questions is asked and also to illustrate the overall flow and interdependence of the LCF interview as a whole.

### **Volume D – Expenditure Codes**

In the Living Costs and Food Survey, information about expenditure is collected at a detailed level. It is collected through both the diary (which respondents fill in daily for a fortnight) and through the Household Questionnaire.

Part 1 Expenditure Codes gives an indication of the types of items to be found under each expenditure code and provides a look-up table between the EFS codes (e-codes) and the COICOP-plus c-codes.

### **Volume E – *The Raw Database***

This volume of the User Documentation describes the raw database. The raw database contains data 'as received' as well as derived variables calculated within the questionnaire. The volume is in three parts, as outlined below.

#### Part 1 - Raw table definitions

The raw variables are grouped into three data files (or tables); this part of the volume defines these raw files and gives information on the three sources of the data (diary, household and income questionnaire).

#### Part 2 - Raw variable list

This is a variable list, listing all raw variables in alphabetical order, and including information on the variable name, description and table name. This list allows details of a variable (such as the file in which it is found) to be looked up if the variable name is known. A column is also present to identify variables that are present in the UK Data Service anonymised dataset.

#### Part 3 - Raw variable coding frame

This lists coding frames for each of the variables in the questionnaires.

#### Appendix A – Standard period code

### **Volume F – *The Derived Database***

This volume of the User Documentation, in four parts, describes the derived database. A summary of anonymisation, particularly in relation to council tax, is also given following the explanatory notes.

#### Part 1 - Derived table definitions

The derived variables are also grouped into separate files (or tables) and this part of the volume defines these files.

#### Part 2 - Derived variable descriptions

All derived variables are listed, including information on the variable name, description, file name (i.e. the table in which the variable is held) and coding frame (where relevant). A column is also present to identify variables that are present in the UK Data Archive anonymised dataset.

#### Part 3 - P-codes

Product codes (or p-codes) are aggregated codes, some at household level and some at person level. Part 3 gives descriptions of these codes as an aid to understanding their structure.

#### Part 4 - Coding frames

This part of the document contains a list of the coding frames associated with the derived variables, including an index of those most used.

### **Volumes G – *Derived Variable Flowcharts***

Volume G of the documentation contains flowcharts and tables that demonstrate how the variables in the database are derived.

Flowcharts for person level, household level, loan transaction and hire purchase transaction variables are included, as well as tables for person level and household level Product Codes. These have been produced on tables rather than flowcharts as they are simply the sum of other variables and do not have any routing to flowchart.

### **Volumes H - Database Changes**

Volume H of the documentation describes the changes that have taken place in the 2015-16 database compared with 2014.

Part 1 - contains the new raw variables for 2015-16.

Part 2 - contains 2014 raw variables that have been deleted for 2015-16.

Part 3 - contains 2014 raw variables that have changed for 2015-16.

Part 4 - contains new derived variables for 2015-16.

Part 5 - contains 2014 derived variables that have been deleted for 2015-16.

Part 6 - contains 2014 derived variables that have changed for 2015-16.

Part 7 - Major changes, highlights some of the more important definitional changes for 2015-16.

There are two other items of documentation that can be provided to users (if required):

- The LCF Diary (adult and young person's)
- LCF Interview Prompt Cards

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## THE INCOME QUESTIONNAIRE

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*Note:* All questions in the Income Questionnaire are asked of adult household members only.

### INTEGRATED HOUSEHOLD SURVEY INCOME QUESTIONS

#### 1. \*SRCINC08 (SC 4)

① Code all that apply

*This card shows various possible sources of income. Can you please tell me which kinds of income you personally receive?*

Showcard (4) options:

- (1) Earnings from employment
- (2) Earnings from self-employment
- (3) Pension from former employer
- (4) Personal Pension
- (5) State Pension
- (6) Child benefit
- (7) Income Support
- (8) Tax Credits
- (9) Other state benefits
- (10) Interest from savings
- (11) Interest from investments
- (12) Other kinds of regular allowance from outside the household
- (13) Income from rent
- (14) Other sources
- (15) No source of income

#### 2. \*SRCINCT

① Individual Prompt - Code all that apply

*I am going to read out various possible sources of income. Can you please tell me which kinds of income you personally receive*

- (1) Earnings from employment or self-employment?
- (2) Pensions including from a former employer, personal pension or the state pension?
- (3) Child benefit, income support, tax credits or any other state benefits?
- (4) Interest on savings or investments?
- (5) Other kinds of regular allowances or from other sources, e.g. rent?
- (6) No source of income - Do not prompt



**3. \*GROSSTEL**

①Please enter amount to the nearest pound. An estimate is acceptable.

①Prompt only if necessary.

*Thinking of the sources you have mentioned, what is your total personal income before deductions for income tax, National Insurance etc (that can be weekly, monthly or an annual amount)?*

0..99999997

**Asked if respondent has (a) source(s) of income**

**4. \*GRSSTIME**

*Is that a weekly, monthly or annual amount?*

(1) Weekly

(2) Monthly

(3) Annually

**Asked if respondent has stated amount of total gross personal income AND total gross personal income is less than or equal to 99999997 (pounds)**

**5. \*TELBAND**

①Running prompt

*We put answers into income bands. Would you tell me which band represents your total personal income before all deductions. Is it...*

- (1) Less than £100 a week
- (2) £100 but less than £200 a week
- (3) £200 but less than £300 a week
- (4) £300 but less than £400 a week
- (5) £400 but less than £500 a week
- (6) £500 but less than £600 a week
- (7) £600 but less than £700 a week
- (8) £700 but less than £800 a week
- (9) £800 but less than £900 a week
- (10) £900 but less than £1000 a week
- (11) Over £1000 a week

**Asked if respondent has refused or does not know their total gross personal income**

**6. \*TELDV**

*DV for weekly amount*

0..999999

**7. \*HHLDAMT**

①Prompt only if necessary. An estimate is acceptable.

*Thinking of the income of the household as a whole, what is the total income of the whole household before deductions for income tax, National Insurance etc?*

0..99999997

**8. \*HHLDPER**

①Ask or record

*Is that a weekly, monthly or annual amount?*

- (1) Weekly
- (2) Monthly
- (3) Annually

**Asked if respondent has stated their gross total household income****9. \*HHLDBAND**

①Running prompt

*We put answers into income bands. Would you tell me which band represents the total income of the household before all deductions. Is it..*

- (1) Less than £100 a week
- (2) £100 but less than £200 a week
- (3) £200 but less than £300 a week
- (4) £300 but less than £400 a week
- (5) £400 but less than £500 a week
- (6) £500 but less than £600 a week
- (7) £600 but less than £700 a week
- (8) £700 but less than £800 a week
- (9) £800 but less than £900 a week
- (10) £900 but less than £1000 a week
- (11) Over £1000 a week

**Asked if respondent has refused to give or does not know their gross total household income****10. \*HHLDDV***DV for weekly amount*

0..999999

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## EMPLOYEE PAY

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**THE FOLLOWING QUESTIONS IN THIS SECTION APPLY ONLY IF:**

The respondent is classified as being 'in employment (excluding unpaid family workers)' according to International Labour Organisation classifications OR respondent is classified as being 'ILO unemployed'

AND is below state pensionable age

AND the date on which respondent left last PAID job was at least two years prior to the date of the interview

And if in current or last main job respondent is/was an employee

**11. ANTICPAY**

① If in new job & not yet paid, code 1 here and give details of anticipated pay at next questions. Select code 2 if the respondent has been paid previously.

- (1) Anticipated pay to be given
- (2) Actual pay to be given

**12. PYDAT**

① If exact day of month not known, enter the 15TH of the month.

*On what date were you last paid a wage or salary? (On what date do you expect to be paid a wage or salary?)*

DATE

**THE REMAINING QUESTIONS IN THIS SECTION APPLY ONLY IF:**

The date on which the respondent was last paid a wage or salary was less than or equal to one year prior to the date of the interview OR if respondent did not know the exact date on which they were last paid

**13. \*PYAMT**

① Suggest respondent consults payslip

*What was your last take home pay, (what will be your take home pay) including overtime, bonus, commission, tips or other payments?*

0.01..99997.00

**14. PYPC***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

**Asked if respondent has stated amount of last take home pay (or anticipated next take home pay)**

**15. \*DVPAY***DV for pay in most remunerative job (PYAMT)*

0.01..9997.00

**16. \*PYTAX***How much was deducted from your wage/salary for income tax under PAYE?*

0.00..9997.00

**17. \*DVTAX1***DV for PyTax*

0.00..9997.00

**Calculated if last take home pay covered between one and 52 weeks**

**18. TAXREF***Did your last pay include a refund of income tax?*

- (1) Yes
- (2) No

**19. TAXREFAM***How much was it?*

0.01..9997.00

**Asked if respondent's last pay included a refund of income tax**

**20. DVTAX***DV for tax refund (TaxRefAm)*

0.01..9997.00

**Calculated if last take home pay covered between one and 52 weeks****21. \*PYNINO***How much was deducted as a National Insurance Contribution?*

0.00..997.00

**22. DVNINO***DV for NI deduction (PyNino)*

0.00..997.00

**Calculated if last take home pay covered between one and 52 weeks****23. DEDCH***Were there any deductions for charities?*

(1) Yes

(2) No

**24. DEDTOT***How much was deducted for charities ?*

0.00..997.00

**Asked if deductions were made from respondent's pay for charities****25. DVDEDTOT***DV for deductions for charities (DedTot)*

0.00..997.00

**Calculated if last take home pay covered between one and 52 weeks****26. DEDUCTS**

① Individual prompt. Code all that apply

*Were there any deductions such as:*

(1) Pension or Superannuation?

(2) AVCs (Additional Voluntary Contributions)?

(3) Union fees?

(4) Friendly societies?

(5) Sports clubs or specialist pastimes?

(6) Repayment of loan from your employer?

(7) Repayment of student loan?

(8) Private medical insurance?

(9) Or any other deductions which we have not mentioned so far?

(10) NONE OF THESE

**27. PENDAMT***How much was deducted for superannuation?*

0.01..997.00

**Asked if deductions were made from respondent's pay for pension or superannuation****28. PYDVPEN***DV for deduction for superannuation (PenDamt)*

0.01..997.00

**Calculated if last take home pay covered between one and 52 weeks****29. AVCAMT***How much was deducted for AVCs?*

0.01..997.00

**Asked if deductions were made from respondent's pay for AVCs****30. DVAVC***How much was deducted for AVCs (AVCAmt)?*

0.01..997.00

**Calculated if last take home pay covered between one and 52 weeks****31. UN DAMT***How much was deducted for union fees?*

0.01..997.00

**Asked if deductions were made from respondent's pay for union fees****32. DVUNI***DV for deduction for union fees (UnDAmt)*

0.01..997.00

**Calculated if last take home pay covered between one and 52 weeks****33. FRIEAT***How much was deducted for Friendly societies?*

0.01..997.00

**Asked if deductions were made from respondent's pay for friendly societies****34. DVFRIE***DV for deduction for Friendly societies (FrieAt)*

0.01..997.00

**Calculated if last take home pay covered between one and 52 weeks**

**35. SPTDAMT**

*How much was deducted for sports clubs or specialist pastimes?*

0.01..997.00

**Asked if deductions were made from respondent's pay for sports clubs or specialist pastimes**

**36. DVSPT**

*DV for deduction for sports etc clubs (SptDAmt)*

0.01..997.00

**Calculated if last take home pay covered between one and 52 weeks**

**37. REMAMT**

*How much was deducted for repaying your employer?*

0.01..997.00

**Asked if deductions were made from respondent's pay for the repayment of loans from their employer**

**38. DVREM**

*DV for repaying employer(RemAmt)*

0.01..997.00

**Calculated if last take home pay covered between one and 52 weeks**

**39. STUAMT**

*How much was deducted for your student loan?*

0.01..997.00

**Asked if deductions were made from respondent's pay for student loan repayments**

**40. DVSTU**

*DV for private student loan (StuAmt)*

0.01..997.00

**Calculated if last take home pay covered between one and 52 weeks**

**41. INSAMT**

*How much was deducted for private medical insurance?*

0.01..997.00

**Asked if deductions were made from respondent's pay for private medical insurance**

**42. DVINS**

*DV for private medical insurance (InsAmt)*  
0.01..997.00

**Calculated if last take home pay covered between one and 52 weeks**

**43. \*PYDTYP**

*What was the purpose of this other deduction?*  
STRING[up to 20 characters]

**Is asked for (up to) the first five 'other' deductions made from the respondent's income**

**44. \*PYFIN**

*New FES code*  
STRING[up to 5 characters]

**Is asked for (up to) the first five 'other' deductions made from the respondent's income**

**45. PYDAMT**

*How much was deducted for [the name of the other deduction is inserted here]?*  
0.01..997.00

**Is asked for (up to) the first five 'other' deductions made from the respondent's income**

**46. DVDEDO**

*DV for PYDAMT*  
0.00..997.00

**47. PYANY**

*Were there any other deductions?*  
(1) Yes  
(2) No

**Is asked for (up to) the first four 'other' deductions made from the respondent's income**

**48. PYSLIP**

*Did respondent consult payslip?*

- (1) Latest payslip consulted
- (2) Old payslip consulted
- (3) Payslip not consulted
- (4) No payslip provided by employer
- (5) No payslip available as electronic payslip provided



**49. \*PYGRS**

① Do not include tax credits in gross pay eg Working Tax Credit or Child Tax Credit  
*What was the gross wage/salary including any superannuation as shown on payslip?*  
 0.01..99997.00

**Asked if respondent consulted payslip**

**50. PYDVGS**

*DV for PAYGRS*  
 0.00..99997.00

**Asked if last take home pay covered between one and 52 weeks**

**51. PAYINC (SC P1)**

① Code all that apply  
*Did your take home pay include any of the items shown on card P1?*

- (1) Statutory Sick Pay
- (2) Statutory Maternity Pay
- (3) Statutory Paternity Pay
- (4) Statutory Adoption Pay
- (5) None of these

**52. HHOTHINC (SC P2)**

*Did the take home pay of [£amount] include refunds for any of these items?*

- (1) Yes
- (2) No

Showcard (P2) options:

- (1) Rent
- (2) Council Tax
- (3) Rates (N Ireland only)
- (4) Water/Sewerage rates (England and Wales)
- (5) Mortgage payment
- (6) Buildings insurance
- (7) Gas
- (8) Electricity
- (9) Telephone
- (10) Internet
- (11) Road Tax
- (12) Vehicle insurance
- (13) Mileage allowance/fixed motoring allowance
- (14) Travel/subsistence
- (15) Any other refund for business expenditure from your current or last employer

**53. \*HHO (SC P2)**

*Describe fully what was covered by the refund.*

Showcard (P2) options:

- (1) Rent
- (2) Council Tax
- (3) Rates (N Ireland only)
- (4) Water/sewerage rates (England and Wales)
- (5) Mortgage payment
- (6) Buildings insurance
- (7) Gas
- (8) Electricity
- (9) Telephone
- (10) Internet
- (11) Road Tax
- (12) Vehicle insurance
- (13) Mileage allowance/fixed motoring allowance
- (14) Travel/subsistence
- (15) Any other refund for business expenditure from your current/last employer

**Is asked for (up to) the first five refunds given on respondent's last take home pay**

**54. \*HHOVEH**

*Please give a brief description of the vehicle for which you received this refund, for instance, red Golf, black BMW*

STRING[up to 50 characters]

**Asked if respondent's last take home pay included (a) refund(s) for Road Tax, vehicle insurance and/or a mileage allowance/fixed motoring allowance**

**55. \*TELREF**

*Was this a landline/fixed telephone or mobile phone?*

- (1) Landline/fixed telephone
- (2) Mobile phone

**Is asked for (up to) the first five refunds given on respondent's last take home pay include Telephone**

**56. HHOAMT**

*What was the amount of the refund?*

0.00..997.00

**Is asked for (up to) the first five refunds given on respondent's last take home pay**

**57. DVHHO**

*DV for refund (HHOAMT)*

0.01..997.00

**Calculated if last take home pay covered between one and 52 weeks**

**58. PREFANY (SC P2)**

*Did the take home pay of [£amount] include refunds for any more of these items?*

- (1) Yes
- (2) No

Showcard (P2) options:

- (1) Rent
- (2) Council Tax
- (3) Rates (N Ireland only)
- (4) Water/Sewerage rates (England and Wales)
- (5) Mortgage payment
- (6) Building insurance
- (7) Gas
- (8) Electricity
- (9) Telephone
- (10) Internet
- (11) Road Tax
- (12) Vehicle insurance
- (13) Mileage allowance/fixed motoring allowance
- (14) Travel/subsistence
- (15) Any other refund for business expenditure from your current or last employer

**Is asked for (up to) the first four refunds given on respondent's last take home pay**

**59. OTHINC3M (SC P3)**

*Have you been refunded by an employer for any of these items in the last 3 months since, either in your previous pay or through other payment methods?*

- (1) Yes
- (2) No

Showcard (P3) options:

- (1) Rent
- (2) Council Tax
- (3) Rates (N Ireland only)
- (4) Water/Sewerage rates (England and Wales)
- (5) Mortgage payment
- (6) Building insurance
- (7) Gas
- (8) Electricity
- (9) Telephone
- (10) Internet
- (11) Road Tax
- (12) Vehicle insurance
- (13) Mileage allowance/fixed motoring allowance

**Asked if respondent is classified as being 'in employment (excluding unpaid family workers)' according to International Labour Organisation classifications OR looking for work 3 months prior to the date of the interview**

**60. \*HHO3M (SC P3)**

*Describe fully what was covered by the refund.*

Showcard (P3) options:

- (1) Rent
- (2) Council Tax
- (3) Rates (N Ireland only)
- (4) Water/Sewerage rates (England and Wales)
- (5) Mortgage payment
- (6) Building insurance
- (7) Gas
- (8) Electricity
- (9) Telephone
- (10) Internet
- (11) Road Tax
- (12) Vehicle insurance
- (13) Mileage allowance/fixed motoring allowance

**Is asked for (up to) the first four refunds**

**61. \*HHOVEH3M**

*Please give a brief description of the vehicle for which you received this refund, for instance,*

*red Golf, black BMW*

STRING[up to 50 characters]

**Is asked for (up to) the first five refunds either from Road Tax, Vehicle insurance or Mileage allowance/Fixed motoring allowance**

**62. \*TELREF3**

*Was this a landline/fixed telephone or mobile phone?*

- (1) Landline/fixed telephone
- (2) Mobile phone

**Is asked for (up to) the first five refunds from a Telephone**

**63. HHOAMT3M**

*What was the amount of the refund?*

0..997

**Is asked for (up to) the first five refunds**

**64. HHOPER3M**

*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

**Is asked for (up to) the first five refunds**

**65. DVHHO3M**

*DV for refund (HHOAmt)*

0.01..997.00

**66. REFANY3M (SC P3)**

*Have you had any more items refunded by an employer in the last 3 months?*

Showcard (P3) options:

- (1) Rent
- (2) Council Tax
- (3) Rates (N Ireland only)
- (4) Water/Sewerage rates (England and Wales)
- (5) Mortgage payment
- (6) Building insurance
- (7) Gas
- (8) Electricity
- (9) Telephone
- (10) Internet
- (11) Road Tax
- (12) Vehicle insurance
- (13) Mileage allowance/fixed motoring allowance

**Is asked for (up to) the first four refunds**

**67. FREEMED**

*Does your employer provide or pay for any free or subsidised MEDICAL INSURANCE?*

- (1) Free medical insurance
- (2) Subsidised medical insurance
- (3) Neither

**Asked if respondent is classified as being 'in employment (excluding unpaid family workers)' according to International Labour Organisation classifications OR if the date on which respondent left last PAID job was more than 3 months prior to the date of the interview**

**68. FMEDNUM**

*How many people (adults & children) in the household does this cover?*

0..97

**Asked if respondent's employer provides/pays for free medical insurance or subsidised medical insurance**

**69. EMFRMEAL**

①Code all that apply

*Have you received any of the following free food or drink from your employer in the last 7 days?*

- (1) Free meals
- (2) Free tea or coffee
- (3) Free soft drinks
- (4) None

**Asked if respondent is classified as being 'in employment (excluding unpaid family workers)' according to International Labour Organisation classifications OR if the date on which respondent left last PAID job was more than 3 months prior to the date of the interview**

**70. FREENUM**

*How many free meals have you received?*

0..97

**Asked if respondent has received free meals from employer in the last 7 days**

**71. INA254**

*Your last take home pay was [£amount].*

*Is/was this the amount you usually receive?*

- (1) Yes
- (2) No
- (3) No usual amount

**72. USNETPAY***What do/did you usually receive each time you are/were paid, AFTER all deductions?*

0.01..999997.00

**Asked if respondent's last take home pay was not the amount they usually receive(d)****73. USGROPAY***What do/did you usually receive each time you are/were paid, BEFORE all deductions?*

0.01..999997.00

**Asked if respondent's last take home pay was not the amount they usually receive(d)****74. GRSPYPER***How often are/were you usually paid?*

- (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

**Asked if respondent has stated how much pay they usually receive(d), before all deductions****75. DVUSN***DV for usual net pay (UsNetPay)*

0.01..999997.00

**Calculated if respondent is usually paid between every week and every 52 weeks****76. DVUSGR***DV for usual gross pay in main job (UsGroPay)*

0.01..999997.00

**Calculated if respondent is usually paid between every week and every 52 weeks**

**77. MALLUSP**

*Does the usual net pay of [£amount] include any allowance for motoring?*

- (1) Yes
- (2) No

**Asked if respondent's last take home pay was not the amount they usually receive(d)**

**78. MALINNP**

*How much is included, usually?*

0.01..997.00

**Asked if respondent's usual net pay includes an allowance for motoring**

**79. DVMANP**

*DV for MALINNP*

0.00..997.00

**Calculated if respondent is usually paid between every week and every 52 weeks**

**80. BONEXTRA**

①Exclude shares & income in kind

*In the last 12 months, have you received any bonuses such as Christmas or quarterly bonus, profit-related pay or profit-sharing bonus or an occasional commission?*

- (1) Yes
- (2) No

**81. \*BONDESC**

*Please describe this bonus*

STRING[up to 20 characters]

**Is asked for (up to) the first three bonuses received by the respondent in the last 12 months, such as Christmas or quarterly bonus, profit-related pay or profit-sharing bonus or an occasional commission**

**82. BONAM**

*How much was this bonus?*

0..9999997

**Is asked for (up to) the first three bonuses received by the respondent in the last 12 months, such as Christmas or quarterly bonus, profit-related pay or profit-sharing bonus or an occasional commission**

**83. DVBON**

*DV for bonus amount (BonAmt)*

0.01..9999997.00



**84. BOBATAX**

*Was this amount*

- (1) before tax
- (2) or after tax?

**Is asked for (up to) the first three bonuses received by the respondent in the last 12 months, such as Christmas or quarterly bonus, profit-related pay or profit-sharing bonus or an occasional commission**

**85. BNSANY**

①Exclude shares & income in kind

*In the last 12 months, have you received any further bonuses such as Christmas or quarterly bonus, profit-related pay or profit-sharing bonus or an occasional commission?*

- (1) Yes
- (2) No

**Is asked for (up to) the first two bonuses received by the respondent in the last 12 months, such as Christmas or quarterly bonus, profit-related pay or profit-sharing bonus or an occasional commission**

**86. BONUPAY**

*Does your USUAL net pay of [£amount] include any of this bonus or commission?*

- (1) Yes
- (2) No

**Asked if respondent has received bonus(es) such as Christmas or quarterly bonus, profit-related pay or profit-sharing bonus or an occasional commission  
And if respondent's last take home pay was not the amount they usually receive(d)**

**87. BONUPAMT**

*How much is included?*

0..9997

**Asked if respondent's usual net pay includes some of the bonus or commission they receive**

**88. DVBONU**

*DV for bonus amount in usual net pay (BonUpAmt)*

0.01..9997.00

**Calculated if respondent is usually paid between every week and every 52 weeks**

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## INCOME FROM SUBSIDIARY JOBS (EMPLOYEE)

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**THE FOLLOWING QUESTIONS IN THIS SECTION APPLY ONLY IF:**

**The respondent is classified as being 'in employment (excluding unpaid family workers)' according to International Labour Organisation classifications OR respondent is classified as being 'ILO unemployed' AND is below state pensionable age AND the date on which respondent left last PAID job was at least two years prior to the date of the interview**

**And if in current or last main job respondent is/was an employee**

**89. ANTICPAY**

① If in new job & not yet paid, code 1 here and give details of anticipated pay at next questions. Select code 2 if the respondent has been paid previously.

- (1) Anticipated pay to be given
- (2) Actual pay to be given

**90. SJBDAT**

① If exact date of month is not known, enter the 15th of the month

*On what date were you last paid a wage or salary? (On what date do you expect to be paid a wage or salary)*

DATE

**91. SJBAMT**

① If the informant is employed abroad, but was not paid in £ sterling, code DK and enter salary details in a note

*What was your LAST take home pay, (what will be your take home pay) including overtime, bonus, commission, tips or other payments?*

0.01..99997.00

**Asked if the date on which the respondent was last paid a wage or salary for their subsidiary job was less than one year prior to the date of the interview OR if respondent does not know the exact date on which they were last paid a wage or salary for their subsidiary job**

**92. SJBPC***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

**Asked if respondent has stated how much was received for their last take home pay in their second/subsidiary job**

**93. \*DVPAYS***DV for pay in subsidiary job (SJbAmt)*

0.01..99997.00

**94. TAXFLT***Was any amount deducted for income tax under PAYE?*

- (1) Yes
- (2) No

**95. \*SJBTAX***How much was deducted from your wage/salary for income tax under PAYE?*

0.00..9997.00

**Asked if some amount of income tax was deducted from respondent's last take home pay for subsidiary job(s) under PAYE**

**96. \*DVTAXS***DV for tax deductions in subsidiary job*

0.01..9997.00

**Asked if respondent's last take home pay covered a period between one week and 52 weeks**

**97. NINOFT***Was any amount deducted for National Insurance?*

- (1) Yes
- (2) No

**98. \*SJBININO**

*How much was deducted as National Insurance Contribution?*

0.00..997.00

**Asked if a National Insurance contribution was deducted from respondent's last take home pay for subsidiary job(s)**

**99. \*DVNINS**

*DV for NI deduction in subsidiary job (SJBININO)*

0.00..997.00

**100. OEDSUB**

*Were there any other deductions?*

(1) Yes

(2) No

**101. \*SJBDTYP**

*What was the purpose of this other deduction?*

STRING[up to 20 characters]

**Is asked for (up to) the first four 'other' deductions made from the respondent's wage/salary in their subsidiary job**

**102. \*SJBFIN**

*New FES code*

STRING[up to 5 characters]

**Is asked for (up to) the first four 'other' deductions made from the respondent's wage/salary in their subsidiary job**

**103. SJBDAMT**

*How much was deducted for deduction?*

0.01..997.00

**Is asked for (up to) the first four 'other' deductions made from the respondent's wage/salary in their subsidiary job**

**104. DVDEDS**

*DV for other deductions in subsidiary job*

0.00..997.00

**105. SJBANY**

*Were there any other deductions?*

- (1) Yes
- (2) No

**Is asked for (up to) the first three 'other' deductions made from the respondent's wage/salary in their subsidiary job**

**106. SJBSLIP**

*Did respondent consult payslip?*

- (1) Latest payslip consulted
- (2) Old payslip consulted
- (3) Payslip not consulted
- (4) No payslip provided by employer
- (5) No payslip available as electronic payslip provided

**107. \*SJBGRS**

*What was the gross wage/salary including any superannuation as shown on payslip?*

0.01..99997.00

**Asked if respondent consulted payslip**

**108. DVGROS**

*DV for SJBGRS*

0.00..99997.00

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## INCOME FROM SELF-EMPLOYMENT

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**THE FOLLOWING QUESTIONS IN THIS SECTION APPLY ONLY IF:**

**Respondent is classified as being 'in employment (excluding unpaid family workers)' according to International Labour Organisation classifications OR respondent is classified as being 'ILO unemployed' AND is below state pensionable age AND respondent is not presently in paid employment, but has had a paid job at some point in their life AND the date on which respondent left last PAID job was at least two years prior to the date of the interview**

**And if in current or last main job respondent is/was self-employed**

### 109. INTRO2

① Exclude mail order agents & babysitters.

*Ask the following questions about current or last main job as self-employed*

Press 1 to continue

1..1

### 110. JOBBUS

① Use this answer (or 'Occupation', etc) later, as appropriate at 'Job/business'

*Can I check, do/did you think of yourself as having a job, or a business?*

(1) Job

(2) A business

(3) (Neither of these)

### 111. BUSACCTS

① Include if prepared by accountant

*In this job/business are/were annual business accounts prepared for the HMRC for tax purposes?*

(1) Yes

(2) No

(3) Not yet but will be

### 112. SOLE

*Are/were you working on your own account or are/were you in partnership with someone else?*

(1) Own account (sole owner)

(2) In partnership

### 113. PARTDISP

*The questions that follow are about just your own share of the business - that is, not including your partner's share.*

Press 1 to continue

1..1

**Asked if respondent worked on annual business account in partnership with someone else**

**114. SE1**

① Enter beginning of period

① If day of month not known, enter 15

*What is the most recent period for which accounts have been prepared for the HMRC?*

DATE

**Asked if in job/business the respondent prepared annual business accounts for the HMRC for tax purposes**

**115. SE2**

① Enter end of period

① If day of month not known enter 15

DATE

**Asked if in job/business the respondent prepared annual business accounts for the HMRC for tax purposes**

**116. SEWEEKS**

① If covers full 12 months enter 52

*May I check, how many weeks does this cover?*

1..104

**Asked if in job/business the respondent prepared annual business accounts for the HMRC for tax purposes**

**117. PROFDOCS**

① First, code document consulted (1st to apply)

*What was the profit or loss figure shown on these accounts for this period? It would be helpful if you could refer to a document, such as the annual accounts, or the Notice of Tax Assessment from the HMRC.*

(1) Notice of Tax Assessment (form no 300 - CODA)

(2) Annual accounts (incl. summary)

(3) Tax Return (self-employment section)

(4) Some other document (describe in a Note)

(5) No document consulted

**Asked if in job/business the respondent prepared annual business accounts for the HMRC for tax purposes**

**118. PROFIT1**

① Now, enter the £ profit/loss amount

① From Notice of Assessment enter income figure at top of form

① From Accounts, enter adjusted profit/loss (if not shown enter net figure)

① From Tax return, enter the 'Total Taxable Profit' from Box

0..9999997

**Asked if in job/business the respondent prepared annual business accounts for the HMRC for tax purposes**

**119. PROFIT2**

*Did the answer in the previous question refer to profit or loss?*

- (1) Profit
- (2) Loss

**Asked if respondent has stated profit/loss amount and profit/loss amount is greater than 0**

**120. DVPROF**

*DV for profit*

0.00..9999997.00

**121. PROFTAX**

*Can I just check, is that the figure before deduction of income tax?*

- (1) Before tax
- (2) After tax

**Asked if respondent's business recorded a profit**

**122. PROFNI**

① *If no lump sum NI paid, enter `3'*

*And is the figure before or after you paid any lump sum (Class 4) National Insurance payments based on taxable profits?*

- (1) Before
- (2) After
- (3) Not applicable (no lump sum NI)

**Asked if amount of profit stated is after tax**

**123. PRBEFORE**

*What was (your share of) the profit BEFORE tax?*

0..9999997

**Asked if amount of profit stated is after tax**

**124. DVPRBEF**

*DV for PRBEFORE*

0.00..9999997.00

**125. WHYNOPRO**

*Why was respondent unable to give a profit or loss figure?*

- (1) Docs with accountant/HMRC
- (2) Other reason

**Asked if respondent does not know amount of profit/loss recorded by business**



**126. WORKACC**

*Do you have separate bank or building society accounts for your work and your private finances?*

- (1) Yes
- (2) No

**Asked if in job/business the respondent prepared annual business accounts for the HMRC for tax purposes OR respondent has not yet prepared business accounts for the HMRC but will be doing**

**127. OWNSUM (SC Q1)**

①Code `yes' if any apply

*Do you draw money from your work account for any non-business purposes, such as any of the things shown on this card?*

- (1) Yes
- (2) No

Showcard (Q1) options:

- (1) Used for payments to yourself and any other personal spending
- (2) Used to pay domestic bills (including standing orders)
- (3) Transferred to a private account
- (4) Used for any other NON-business purpose

**Asked if respondent has separate bank or building society accounts for work and private finances**

**128. OWNAMT**

*Thinking of the last 12 months, on average how much did you take each month for these non-business purposes?*

1..9997

**Asked if respondent draws money from their work account for non-business purposes**

**129. DVOWNAMT**

*DV for OWNAMT*

0.00..9997.00

**130. OWNOTHER**

*Apart from drawings from the bank/building society, do/did you receive any other income from this job/business, for personal use?*

- (1) Yes
- (2) No

**Asked if respondent draws money from their work account for non-business purposes**

**131. OWNOTAMT**

*On average, how much is that each month?*

0..9997

**Asked if apart from drawings from the bank/building society, the respondent received other income from job/business, for personal use**

**132. DVOWNOT**

*DV for OWNOTAMT*

0.00..9997.00

**133. SEINC**

①Enter an estimate if actual figure not known

*Now I'd like to ask some questions about your income from your job/business, that is, after paying for any materials, equipment or goods that you use(d) in your work.*

*On average, what is your weekly or monthly income from this job/business over the last 12 months?*

0..99997

**Asked if respondent's business did not record a profit during the last accounting period AND respondent has not stated how much on average, during the last 12 months, was taken from their work account(s) for any non-business purposes**

**134. SEINCWM**

①Interviewer ask or code:

*Was that weekly or monthly income?*

- (1) Weekly income
- (2) Monthly income

**Asked if respondent has stated average weekly or monthly income from job/business over the last 12 months AND average weekly or monthly income is greater than 0**

**135. \*DVSEINC**

*DV for SEINC*

0.00..99997.00

**136. CHECKTAX**

①(This is `class 2' NI)

*May I just check, was either income tax, or your regular National Insurance contribution deducted at source?*

- (1) Income tax deducted
- (2) Regular NI deducted
- (3) No, neither deducted

**Asked if respondent's business did not record a profit during the last accounting period AND respondent has not stated how much on average, during the last 12 months, was taken from their work account(s) for any non-business purposes**

**137. \*TAXDAMT**

*How much income tax was deducted last time?*

0..9997

**Asked if income tax was deducted at source from respondent's business income**

**138. PERCTAXD**

*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

**Asked if respondent has stated amount of income tax deducted last time AND income tax amount deducted last time was greater than 0 (pounds)**

**139. \*DVTAXD**

*DV for TAXDAMT*

0.00..9997.00

**140. NIDAMT**

*How much National Insurance was deducted last time?*

0.01..9997.00

**Asked if regular NI was deducted at source from respondent's business income**

**141. PERCNID**

*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

**Asked if respondent has stated how much National Insurance was deducted last time AND National Insurance amount was greater than 0**

**142. \*DVNID**

*DV for NIDAMT*

0.01..9997.00

**143. CHKINCOM**

*May I check, is your average income of [amount] before or after tax or national insurance was deducted?*

- (1) Before
- (2) After

**Asked if income tax was deducted at source from respondent's business income OR regular NI was deducted at source from respondent's business income**

**144. SENIREG**

①(KNOWN AS 'CLASS 2')

*Do you pay a regular National Insurance contribution in connection with this job?*

- (1) Yes
- (2) No

**Asked if in the loop for respondents who are below state pensionable age AND if in respondent's job/business a regular NI contribution is not deducted at source**

**145. SENIRAMT**

*How much was your last National Insurance payment?*

0.01..997.00

**Asked if respondent pays a regular National Insurance contribution in connection with job**

**146. PERCSENI**

*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

**Asked if respondent has stated the amount that they paid for National Insurance last time AND the amount of the contribution was greater than zero**

**147. DVSENI**

*DV for SENIRAMT*  
0.01..997.00

**148. SETAX**

*(Apart from tax deducted at source) Have you made any (other) income tax payments relating to this job/business in the last 12 months?*

- (1) Yes
- (2) No

**149. \*SETAXAMT**

*How much did you pay altogether in the last 12 months?*  
1..999997

**Asked if respondent has made other income tax payments relating to the job/business in the last 12 months**

**150. \*DVSETAX**

*DV for SETAXAMT*  
0.00..99997.00

**151. SENIINC**

*Does that figure include a lump sum (Class 4) National Insurance contribution based on taxable profits?*

- (1) Yes
- (2) No

**Asked if respondent has made other income tax payments relating to the job/business in the last 12 months**

**152. SENIAMT**

*How much was the National insurance lump sum payment?*  
1..9997

**Asked if respondent's tax payments for the last 12 months include a lump sum (Class 4) National Insurance contribution based on taxable profits**

**153. DVSENI***DV for SENIIAMT*

0.00..9997.00

**154. SENILUMP***In the last 12 months have you paid any lump sum NI contributions based on taxable profits?*

(1) Yes

(2) No

**Asked if respondent's tax payments for the last 12 months do not include a lump sum (Class 4) National Insurance contribution based on taxable profits****155. SENILAMT***What was your total lump sum payment in the last 12 months?*

0..9997

**Asked if respondent has paid lump sum NI contributions based on taxable profits****156. SENILYR***Can I check, how many years did this payment of [£amount] cover?*

1..97

**Asked if total lump sum payment for the last 12 months is greater than 2500 (pounds)****157. DVSENI***DV for SENILAMT*

0.00..9997.00

**158. SEBUSEXP (SC Q2)***Are there any items on this card which you have claimed or will be claiming as a business expense for tax purposes?*

(1) Yes

(2) No

Showcard (Q2) Options:

- (1) Vehicle expenses
- (2) Rent
- (3) Mortgage payments
- (4) Council Tax/Rates (N Ireland)
- (5) Water/sewerage rates
- (6) Buildings insurance
- (7) Gas
- (8) Electricity
- (9) Telephone
- (10) Internet
- (11) Any other items

**Asked if respondent who some paid work in the seven days ending last Sunday OR respondent had a job or business that they were away from OR respondent left last PAID job less than 3 months prior to the date of the interview**

**159. SEBETYP (SC Q2)**

① Only claimed expenses that relate to the sampled address should be entered here.

① Code all that apply

*Which items have you claimed or will you be claiming as business expenses for tax purposes?*

Showcard (Q2) Options:

- (1) Vehicle expenses
- (2) Rent
- (3) Mortgage payments
- (4) Council Tax/Rates (N Ireland)
- (5) Water/sewerage rates
- (6) Buildings insurance
- (7) Gas
- (8) Electricity
- (9) Telephone
- (10) Internet
- (11) Any other items

**Asked if respondent has claimed or will be claiming certain items (shown on the card) as a business expense for tax purposes**

**160. SEBEAMT**

① If possible obtain percentages for period ^SE1 to ^SE2.

① Actual amounts of expenses claimed can be given if percentages cannot: record these in a note

① Expenses claimed should relate to this house/flat only

*What percentage have you claimed or will you be claiming?*

1..100

**Asked if respondent has claimed or will be claiming certain items (shown on the card) as a business expense for tax purposes**

**161. \*EXPO**

*Please describe the other expense(s)*

STRING[up to 20 characters]

**Asked if respondent has claimed or will be claiming 'anything else' expenses as business expenses for tax purposes**

**162. \*SEBUVEH**

*Please give a brief description of the vehicle that you are claiming business expenses for, for instance, red Golf, black BMW*

STRING[up to 50 characters]

**Asked if respondent has claimed or will be claiming vehicle expenses as business expenses for tax purposes**

**163. SETEL**

*Was this a landline/fixed telephone or mobile phone?*

- (1) Landline/fixed telephone
- (2) Mobile phone
- (3) Both landline and mobile phone

**Asked if respondent has claimed or will be claiming telephone expenses as business expenses for tax purposes**

**164. NOINC**

① Interviewer code: Respondent has no income from this self-employment. If possible, from knowledge of household code if this is because respondent has income from

- (1) partner/other household member
- (2) investments/assets
- (3) non-household member
- (4) other source
- (5) DK

**Is asked for (all of) respondent's subsidiary jobs as self-employed  
If respondent does not know amount of profit/loss recorded by their (main) business during the last accounting period/ OR amount of profit/loss has been stated as being 0/ OR amount of loss recorded by their (main) business has been stated as being greater than 0 AND respondent does not draw money from their work account(s) for non-business purposes/ OR respondent does not know if they draw money from their work account(s) for non-business purposes/ OR average weekly/monthly income from business (in last 12 months) has been stated as being 0 AND respondent does not have separate bank or building society accounts their work and private finances or in this job/business annual business accounts are not prepared for the HMRC for tax purposes**

**165. \*INCO**

① Describe other sources of income

STRING[up to 40]

**Is asked for (all of) respondent's subsidiary jobs as self-employed  
And if respondent has no income from self-employment because respondent has income from other source**



## INCOME FROM SUBSIDIARY JOB (SELF-EMPLOYED)

### 166. SEBUSEXP

*Are there any items on this card which you have claimed or will be claiming as a business expense for tax purposes?*

- (1) Yes
- (2) No

**Is asked for (all of) respondent's subsidiary jobs as self-employed**

**And if respondent did some paid work in the seven days ending last Sunday OR in loop for respondents who had a job or business that they were away from OR in loop for respondents who left last PAID job more than 3 months prior to the date of the interview**

### 167. SEBEXTYP

*Which items have you claimed or will you be claiming as business expenses for tax purposes?*

- (1) Vehicle expenses
- (2) Rent
- (3) Mortgage payments
- (4) Council Tax/Rates (NI)
- (5) Water/sewerage rates (England & Wales)
- (6) Buildings insurance
- (7) Gas
- (8) Electricity
- (9) Telephone
- (10) Internet
- (11) Any other items

**Asked if there are certain items (listed on the card) which respondent has claimed or will be claiming as business expenses for tax purposes**

### 168. SEBEPKA

① If possible obtain percentages for period ^SE1 to ^SE2.

① Actual amounts of expenses claimed can be given if percentages cannot. Record these actual amounts in a note

① Expenses claimed should relate to this house/flat only

*What percentage have you claimed or will you be claiming?*

1..100

**Asked if respondent has claimed or will be claiming certain expenses as business expenses for tax purposes**

**169. \*EXPO**

*Please describe the other expense(s)*

STRING[up to 20 characters]

**Asked if respondent has claimed or will be claiming any other items/services as business expenses for tax purposes**

**170. \*SEBXVEH**

*Please give a brief description of the vehicle that you are claiming business expenses for, for instance, red Golf, black BMW*

STRING[up to 50 characters]

**Asked if respondent has claimed or will be claiming vehicle expenses as business expenses for tax purposes**

## NATIONAL INSURANCE CONTRIBUTIONS

### 171. NICONT

① National Insurance contributions that have already been recorded in the employee pay section or the self-employment section should not be recorded here.

*Do you pay a regular National Insurance contribution?*

- (1) Yes
- (2) No

**Applies to all respondents who are below the state pensionable age  
And if respondent is classified as being 'economically inactive' according to  
International Labour Organisation classifications OR respondent is classified as  
being 'ILO unemployed' OR respondent is classified as being an 'unpaid family  
worker' according to the ILO**

### 172. NICONTAM

① National Insurance contributions that have already been recorded in the employee pay section or the self-employment section should not be recorded here.

*How much was the last contribution you paid?*

0.00..99997.00

**Asked if respondent pays a regular National Insurance contribution**

### 173. NIPER

*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

**Asked if respondent has stated how much National Insurance was paid last time**

### 174. DVNIC

*DV for the last NI contribution (NIContAM)*

0.00..99997.00

**175. NIDIRECT**

①N.B. This should not duplicate any details of regular contributions entered earlier  
*(Apart from the contributions you have mentioned) have you made any lump sum payments of N.I. contributions to HMRC or DWP during the last 12 months?*

- (1) Yes
- (2) No

**Applies to all respondents who are below the state pensionable age  
And if respondent did not do any paid work in the seven days ending last Sunday  
OR if employed, respondent's employment status in their main job was an  
employee**

**176. DIRNIAM**

*How much did you pay?*

0..999997

**Asked if respondent has made (a) lump sum payment(s) of NI contributions to  
HMRC or DWP in the last 12 months**

## ODD JOBS

### 177. ODJFILT

①Code all that apply

*During the last 4 weeks have you received any money from the kinds of work shown on this card, which we have not yet covered?*

SET [3] OF

- (1) Babysitter
- (2) Mail order agent
- (3) Odd job, occasional work or professional advice
- (4) No to all

### 178. ODDJMP

①If respondent works both as an employee and self-employed, select the status in which they work the most hours.

*In this/these job(s) do you work as an employee or are you self-employed?*

- (1) as an employee,
- (2) or as self-employed?

**Is asked if respondent works as either babysitter, mail order agent or odd job, occasional work or professional advice**

### 179. BABPAY

①Please refer to the amount paid for all babysitting jobs in the last 4 weeks.

*How much income did you receive in the last 4 weeks for babysitting?*

1..9997

**Is asked if respondent works as a babysitter**

### 180. DVBAB

*DV FOR BABPAY*

0.00..9997.00

### 181. BABNOW

*Have you done this work in the last 7 days?*

- (1) Yes
- (2) No

### 182. MAILPAY

①Please refer to the amount paid for all babysitting jobs in the last 4 weeks.

*How much income did you receive in the last 4 weeks as a mail order agent?*

1..9997

**Is asked if respondent works as a Mail order agent**

**183. DVMAIL***DV FOR MAILPAY*

0.00..9997.00

**184. MAILNOW***Have you done this work in the last 7 days?*

(1) Yes

(2) No

**185. \*ODDJDESC**① IF RESPONDENT HAS MORE THAN ONE ODD JOB ANSWER FOR ONE JOB AT A TIME*What kind of occasional work did you do/professional advice did you give?*

STRING[up to 40 characters]

**Is asked for (up to) the first five odd jobs carried out by the respondent in the last 4 weeks****186. ODDJPR***Have you done this work in the last 7 days?*

(1) Yes

(2) No

**Is asked for (up to) the first five odd jobs carried out by the respondent in the last 4 weeks****187. ODDJRG***Is the job done on a regular basis?*

(1) Yes

(2) No

**Is asked for (up to) the first five odd jobs carried out by the respondent in the last 4 weeks****And if respondent has done the job/occasional work in the last 7 days****188. ODDJAMT***How much in total did you receive for the job in the last 4 weeks?*

1..9997

**Is asked for (up to) the first five odd jobs carried out by the respondent****189. DVODD***DV for ODDAMT*

0.00..9997.00

**190. ODDJANY**

*Did you receive any money for any more odd jobs in the last 4 weeks?*

- (1) Yes
- (2) No

**Is asked for (up to) the first four odd jobs carried out by the respondent**

## BUS PASSES

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### 191. BUSPASS

① Exclude season tickets

*At present do you have a older person's concessionary bus pass, permit, tokens or tickets?*

- (1) Yes
- (2) No

**Asked if respondent is over 60 years old**



## CHANGES TO THE STATE BENEFITS QUESTIONS

This section provides a summary of the changes that have been made to the state benefits section of the questionnaire from July 2013 onwards. The harmonised standard for benefits and tax credits, which was developed by DWP in consultation with ONS, has been adopted as far as possible. Any areas where the LCF has deviated substantially from the standard questions used on the FRS have been highlighted below. The following notes are retained in this User Guide for the convenience of data users.

### General notes

All adult respondents are asked whether they are in receipt of any state benefits. For each benefit received there follows questions about the method of payment, amount last received and, for certain benefits, other follow up questions.

Definitions of each benefit (excluding a few uncommon ones) are given below, under the question at which their receipt is recorded (*WAgeBen* to *OtherBen*).

### Notes on Housing Benefit

Please be aware that information on housing benefit is now recorded only in the rent section of the LCF. The questions are located in Volume B of the User Guide.

### Question information for WAgeBen

#### 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.

#### 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, dependent children, whether anyone has a disability, weekly income and savings. The savings limit for the claimant (and partner if any) is £16,000.

#### 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.

#### Jobseeker's Allowance (JSA)

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.

### Question Information for DisBen

Disability Living Allowance (replaced by Personal Independence Payments from April 2013) have two elements and are directed at the care (known as daily living for PIP) and mobility needs of **disabled people of working age and below**.

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

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

PIP has two rates for both **daily living** and the **mobility** component: enhanced rate and standard rate.

The **daily living** enhanced rate is equivalent to the **higher** rate of DLA care component and the standard rate is equivalent to the **middle** rate of DLA care component.

The **mobility** enhanced rate is equivalent to the **higher** rate of DLA mobility component and the standard rate is equivalent to the **lower** rate of DLA mobility component.

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.

#### Attendance Allowance (AA)

AA 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 OtherBen. See the later instruction at that question for the definition of REA.

### **Question Information for KidBen**

#### Child Benefit

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 CB 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.

### **Question Information for PenBen**

#### 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: 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 other state benefits (see section OtherBen).

### 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.

**Question Information for OtherBen**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 (£2,000) 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 section PenBen).

Universal Credit Budgeting Advance

The Universal Credit Budgeting Advance is a loan to help pay for emergency household costs (for example buying a new cooker) or for help getting a job or staying in work.

The advance is repaid through regular Universal Credit payments, which are reduced until the loan is repaid.

## BENEFITS

### **Individual Benefits/Tax Credits**

#### **192. WAGEBEN**

① Code all that apply

*Looking at this card, are you at present receiving any 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 Working Tax Credit)
- (5) Income Support
- (6) Jobseeker's Allowance
- (7) Employment and Support Allowance
- (8) Carers Allowance
- (9) None of these
- (97) Spontaneous only - One of these/more than one of these, but I don't know which

**Asked if respondent is over 16 years old**

#### **193. TCEVER**

① Code all that apply

① 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.

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

- (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

**Asked if respondent is currently not receiving Universal Credit, Working Tax Credit or Child Tax Credit**

#### **194. TCTHSYR**

① Code all that apply

*Have you received any tax credit payments since April 2015?*

- (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

**Asked if respondent has ever received Working Tax Credit or Child Tax Credit**



**195. TCREPAY**

① Respondent is not receiving tax credits at the moment but did earlier this financial year or in a previous year

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

- (1) My partner receives them
- (2) Repaying an overpayment from earlier this year
- (3) Repaying an overpayment from previous year
- (4) Not completed application form.
- (5) Income too high
- (6) Not eligible for another reason
- (7) Other

**Asked if respondent has recorded receiving Working Tax Credit or Child Tax Credit since April 2015**

**196. DISBEN**

① Code all that apply

*And looking at this card, are you at present receiving any of the state benefits shown on this card - either in your own right, or on behalf of another person?*

- (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
- (97) Spontaneous only - One of these/more than one of these, but I don't know which

**Asked if respondent is over 16 years old**

**197. PIPTYPE**

① Running prompt

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

- (1) Daily Living Only
- (2) Mobility Only
- (3) Both – Daily Living and Mobility

**Asked if respondent has recorded receiving Personal Independence Payment**

**198. PIPMOTA**

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

- (1) Yes
- (2) No

**Asked if respondent has recorded receiving Mobility Only or Both as type of Personal Independence Payment**

**199. DLATYPE**

①Running prompt

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

- (1) Care component only
- (2) Mobility Component only
- (3) Both – Care and Mobility components

**Asked if respondent has recorded receiving Disability Living Allowance****200. DLAMOTA***Is your Disability Living Allowance the car allowance known as Motability?*

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

**Asked if respondent has recorded receiving Mobility Component Only or Both types of Disability Living Allowance****201. PENBEN (SC S1)**

①Code all that apply

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

Showcard (S1) options:

- (1) Pension Credit
- (2) State Retirement Pension
- (3) Widow's Pension, Bereavement Allowance, Widowed Parent's Allowance (formerly Widowed Mother's Allowance)
- (4) Armed Forces Compensation Scheme (formerly War Disablement Pension), including Guaranteed Income Payments
- (5) War Widow's/Widower's Pension (and any related allowances)
- (6) None of these
- (97) Spontaneous only - Don't know

**Asked if respondent is over 16 years old****202. WID***Ask or record which one was received*

- (1) Widow's Pension
- (2) Widowed Mother's Allowance
- (3) Bereavement Allowance
- (4) Widow's Parent's Allowance

**Asked if respondent is receiving Widow's Pension, Bereavement Allowance, Widowed Parent's Allowance**

**203. AA**

*Is this attendance allowance part of your pension or do you receive a separate payment?*

- (1) Paid as part of pension
- (2) Separate payment

**Asked if respondent is recorded as receiving Attendance Allowance  
And respondent is recorded as receiving Widow's Pension, Bereavement Allowance,  
Widowed Parent's Allowance or State Retirement Pension**

**204. DC**

*Is this care component of DLA paid as part of your pension, or do you still receive a separate payment?*

- (1) Paid as part of pension
- (2) Separate payment

**Asked if respondent is recorded as receiving Care or Both type of Disability Living Allowance  
And respondent is recorded as receiving Widow's Pension, Bereavement Allowance,  
Widowed Parent's Allowance or State Retirement Pension**

**205. DM**

*Is this mobility component of DLA paid as part of your pension, or do you receive a separate payment?*

- (1) Paid as part of pension
- (2) Separate payment

**Asked if DLA type is answered as Care or Both AND PenBen is answered as WidBen or SRP**

**206. DEFRPEN**

① The respondent is over state pension age and so could collect state pension BUT they have not reported having NI retirement pension (or Widows pension/bereavement allowance) or Old Person's pension. However, some people defer taking their State Pension in order to build up extra State Pension which they will 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

**Asked if respondent is over state pension age but is not reported as having State Retirement Pension or Widows Benefit in PenBen**

**207. \*DEFRPEX**

① It appears that the respondent is not claiming Retirement Pension and has not deferred their State Pension. Please check the reason for this and explain in a note.

STRING[up to 100 characters]

**Asked if respondent has not deferred state pension and is not recorded as receiving state pension, but is of state pension age**

**208. KIDBEN (SC S2)**

① Code all that apply

*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?*

SET [3] OF

Showcard (S2) options:

- (1) Child Benefit
- (2) Guardian's Allowance
- (3) Maternity Allowance
- (4) None of these
- (97) Spontaneous only - One of these/more than one of these, but I don't know which

**Asked if respondent is over 16 years old**

**209. CBCHK**

① Running prompt

① If 'other' please explain in a note

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

- (1) Someone else in the household receives Child Benefit
- (2) You have chosen to stop receiving Child Benefit payments due to having a high income
- (3) You have not applied for Child Benefit
- (4) Other

**Asked if respondent is not recorded as receiving Child Benefit but there is a dependent child in the household**

**210. SOCFUND (SC S2)**

① Code all that apply

*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?*

SET [3] OF

Showcard (S3) options:

- (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 (exclude Universal credit budget allowances)
- (4) None of these
- (97) Spontaneous only - One of these/more than one of these, but I don't know which

**This question is not asked in Northern Ireland**

## 211. OTHERBEN (SC S4)

①Code all that apply

*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?*

SET [5] OF

Showcard (S4) options:

- (1) Extended Payment of Housing Benefit/Rent Rebate (4 weeks payment only)
- (2) Bereavement Payment
- (3) Universal Credit Budgeting Advance
- (4) A loan or grant from your Local Authority
- (5) Any National Insurance or State Benefit not mentioned earlier
- (6) None of these
- (97) Spontaneous only - @B One of these/more than one of these, but I don't know which

**Asked if respondent is over 16 years old**

## 212. \*OTHNAME

*What is the name of the other benefit you receive?*

STRING [ 40 ]

**Asked if respondent is recorded as receiving Any National Insurance or State Benefit not mentioned earlier in OTHERBEN**

## 213. INCLUS (SC T1)

①Code all that apply

*Did your last wage/salary include any of the items on this card?*

Showcard (T1) options:

- (1) Statutory Sick Pay
- (2) Statutory Maternity Pay
- (3) Statutory Paternity Pay
- (4) Statutory Adoption Pay
- (5) Income Tax Refund
- (6) Mileage Allowance or fixed allowance for motoring
- (7) Motoring Expenses Refund
- (8) None of these

**Asked if respondent did some paid work in the seven days ending last Sunday OR if respondent had a job or business that they were away from OR respondent was on a government employment scheme in the seven days ending last Sunday OR if respondent did some unpaid work in that week for a business that they own OR if respondent did unpaid work in that week for a business that a relative owns**

**214. WINTER**

*In the last 12 months have you received a winter fuel payment in your own right?*

- (1) Yes
- (2) No

**Asked if respondent is aged 60 or over**

**215. XMASBON**

*In the last 12 months, have you received a state Christmas bonus?*

- (1) Yes
- (2) No

**Asked if respondent is over 16 years old**

**Questions asked in relation to each benefit (except housing benefit)**

**216. BENLETR**

*Do you have a letter or award notice from the DWP or benefits agency that you could consult?*

- (1) Yes
- (2) No

**217. BANKSTMT**

*Or is there a bank statement you could consult?*

- (1) Yes
- (2) No

**Asked if respondent does not have a letter or award notice from the DWP or benefits agency which they can consult**

**218. BENAMT**

① If combined with another benefit and unable to give separate amount, enter don't know for both/ all such benefits

*How much did you get last time?*

0.00..997.00

**219. BENAMTDK**

*Is this `don't know` because it's paid in combination with another benefit, and you cannot establish a separate amount?*

- (1) Yes (Please give full details in a Note)
- (2) No

**Asked if benefit amount is refused OR amount is not known**

**220. BENPD**

*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

**Asked if benefit amount is given AND amount is greater than 0**

**221. O\_BAMT**

*Original benefit amount before imputation?*

0.00...997.00

**222. BENIMP**

*Was benefit amount imputed?*

(1) Yes

(2) No

**223. WEEKS**

① Please record length of time since respondent started receiving payments, rather than when they first claimed the benefit

*For how long have you been receiving this 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

**Asked if respondent receives Income Support OR Job Seeker's Allowance OR Pension Credit OR Incapacity Benefit OR Statutory Sick Pay OR Maternity Allowance OR Statutory Maternity Pay OR any other NI or state benefit OR Children's Tax Credit (old) OR Working Tax Credit OR Child Tax Credit**

**224. WEEKS2**

*For how many weeks have you been on this benefit?*

1..104

**Asked if the respondent has been receiving benefit for up to two years**



## **Derived variables for weekly amounts received and supplementary questions**

### **225. DVUC**

*DV for Universal Credit*

0.00..997.00

**Recorded when Universal Credit selected in WAgeBen**

### **226. DVWTC**

*DV for Working Tax Credit*

0.00..997.00

**Recorded when Working Tax Credit selected in WAgeBen**

### **227. WTCD**

*Does the payment of Working Tax Credit include a disability element?*

(1) Yes

(2) No

**Asked if respondent receives Working Tax Credit**

### **228. CCTC**

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

(1) Yes

(2) No

**Asked if respondent receives Working Tax Credit**

### **229. DVCTC**

*DV for Child Tax Credit*

0.00..997.00

**Recorded when Child Tax Credit selected in WAgeBen**

### **230. DVIS**

*DV for Income Support*

0.00..997.00

**Recorded when Income Support selected in WAgeBen**

**231. 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 related' - which is based on an assessment of your income,
- (3) or is it a combination of 'contributory' and 'income related?'

**Asked if respondent is receiving Job's Seekers Allowance**

**232. DVJSACON**

*DV for Jobseeker's Allowance - Contributions*

0.00..997.00

**Recorded when 'Contributory' or is it a combination of 'contributory' and 'income related selected in JSAType**

**233. DVJSAIB**

*DV for Jobseeker's Allowance – Income Based*

0.00..997.00

**Recorded when 'Income' selected in JSAType**

**234. DVJSACOMB**

*DV for Jobseeker's Allowance – Combined*

0.00..997.00

**Recorded when a combination of 'contributory' and 'income related' selected in JSAType**

**235. ESATYPE**

①Running Prompt

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

- (1) 'contributory' - that is based on your National Insurance contributions,
- (2) or is it 'income related' - which is based on an assessment of your income,
- (3) or is it a combination of 'contributory' and 'income related?'

**Asked if respondent is receiving Employment and Support Allowance**

**236. DVESA**

*DV for Employment Support Allowance*

0.00..997.00

**Recorded when Employment Support Allowance selected in WAgeBen**

**237. DVCA***DV for carer's allowance*

0.00..997.00

**Recorded when Carer's Allowance selected in WAgeBen****238. CAPER**

① If current household member, enter the persons number(s). Otherwise enter one of 21 to 24

*Who is the person you care for who qualifies you for the allowance?*

1..24

**Asked if respondent receives carer's allowance****239. DVPIPCAR***DV for Personal Independence Payment*

0.00..997.00

**Recorded when Personal Independence Payment selected in DisBen  
And also Daily Living only and Both – Daily Living and Mobility are selected in  
PIPTYPE****240. WHREPCAR**

① If current household member, enter the persons number(s). Otherwise enter one of 21 to 24

*Who do you receive the daily living component of Personal Independence Payment for?*

1..24

**Asked if respondent is receiving the Care component of Personal Independence  
Payment or Both components of Personal Independence payment****241. DVPIPMOB***DV for Personal Independence Payment*

0.00..997.00

**Recorded when Personal Independence Payment selected in DisBen  
And also Mobility only and Both – Daily Living and Mobility are selected in PIPTYPE****242. WHREPMOB**

① If current household member, enter the persons number(s). Otherwise enter one of 21 to 24

*Who do you receive the daily mobility component of Personal Independence Payment for?*

1..24

**Asked if respondent is receiving the Mobility component of Personal Independence  
Payment or Both components of Personal Independence payment**

**243. DVDLACAR**

*DV for Disability Living Allowance*  
0.00..997.00

**Recorded when Disability Living Allowance selected in DisBen  
And also Care component only and Both – Care and Mobility are selected in DLAType**

**244. WHREDCAR**

① If current household member, enter the persons number(s). Otherwise enter one of 21 to 24  
*Who do you receive the care component of Disability Living Allowance for?*  
1..24

**Asked if respondent is receiving the Care component of Personal Independence  
Payment or Both components of Personal Independence payment**

**245. DVDLAMOB**

*DV for Disability Living Allowance*  
0.00..997.00

**Recorded when Disability Living Allowance selected in DisBen  
And also Mobility component only and Both – Care and Mobility are selected in  
DLAType**

**246. WHREDMOB**

① If current household member, enter the persons number(s). Otherwise enter one of 21 to  
24  
*Who do you receive the mobility component of Disability Living Allowance for?*  
1..24

**Asked if respondent is receiving the Mobility component of Personal Independence  
Payment or Both components of Personal Independence payment**

**247. DVAA**

*DV for Attendance Allowance*  
0.00..997.00

**Recorded when Attendance Allowance selected in DisBen  
And not paid as part of pension in AA**

**248. WHOREC**

① If current household member, enter the persons number(s). Otherwise enter one of 21 to 24  
*Who receives Attendance Allowance?*  
1..24

**Asked if respondent has recorded receiving Attendance Allowance**

**249. GETCA**

① Include other household members or someone outside the household  
*Is anybody getting carers allowance for looking after you?*

- (1) Yes
- (2) No

**Asked if respondent is recorded as receiving Attendance Allowance or Disability Living Allowance**

**250. DVSDA**

*DV for Severe Disability Allowance*  
0.00..997.00

**Recorded when Severe Disablement Allowance selected in DisBen**

**251. DVIB**

*DV for Incapacity Benefit*  
0.00..997.00

**Recorded when Incapacity Benefit selected in DisBen**

**252. DVIIDB**

*DV for Industrial Injury Disablement Benefit*  
0.00..997.00

**Recorded when Industrial Injury Disablement Benefit selected in DisBen**

**253. DVPC**

*DV for Pension Credit*  
0.00..997.00

**Recorded when Pension Credit selected in PenBen**

**254. PCOMP**

① Code all that apply

*Do you receive the guaranteed or the savings element of pension credit?*

- (1) Guaranteed element received
- (2) Savings element received

**Asked if respondent receives Pension Credit**

**255. DVSRP**

*DV for State Retirement Pension*  
0.00..997.00

**Recorded when State Retirement Pension selected in PenBen**

**256. DVWID**

*DV for Widows Pension, Bereavement Allowance, Widowed Parent's Allowance (formerly Widowed Mother's Allowance)*  
0.00..997.00

**Recorded when Widow's Pension, Bereavement Allowance, Widowed Parent's Allowance (formerly Widowed Mother's Allowance) selected in PenBen**

**257. DVAFCS**

*DV for Armed Forces Compensation Scheme*  
0.00..997.00

**Recorded when Armed Forces Compensation Scheme (formerly War Disablement Pension), including Guaranteed Income Payments selected in PenBen**

**258. DVWWP**

*DV for War Widows Pension*  
0.00..997.00

**Recorded when War Widow's/Widower's Pension (and any related allowances) selected in PenBen**

**259. CBTAX**

① 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 pay the money back through tax.

*Do you pay a high income Child Benefit tax charge on the Child Benefit you receive?*

- (1) Yes
- (2) No

**Asked if respondent receives Child Benefit**

**260. CBPAYE**

① 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 payment.

*Do you make that payment through work PAYE?*

- (1) Yes
- (2) No

**And had to pay a High Income Child Benefit charge on the Child Benefit they receive**

**261. CBTAXAMT**

① This may have been calculated by the respondent on their last self-assessment return, if they have completed a tax return. Alternatively they may have an estimate of the liability from an on-line calculator. Most respondents should be able to provide an annual amount.

*How much was this last time?*

*0.00..997.00*

**And had to pay a High Income Child Benefit charge on the Child Benefit they receive**

**262. CBTAXPD**

*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

**Asked if the respondent has paid high income tax charge on Child Benefit**

**263. DVCB**

*DV for Child Benefit*

*0.00..997.00*

**Recorded when Child Benefit selected in KidBen**

**264. DVCBTAX**

*DV for Child Benefit tax*  
0.00..997.00

**Recorded when Child Benefit selected in KidBen**

**265. DVGA**

*DV for Guardian's Allowance*  
0.00..997.00

**Recorded when Guardian's Allowance selected in KidBen**

**266. DVMA**

*DV for Maternity Allowance*  
0.00..997.00

**Recorded when Maternity Allowance selected in KidBen**

**267. DVSFEX**

*DV for Social Fund Funeral Expenses Grant*  
0.00..997.00

**Recorded when a grant from the Social Fund for funeral expenses selected in SocFund**

**268. DVSFMAT**

*DV for Social Fund Maternity Grant*  
0.00..997.00

**Recorded when a grant from the Social Fund for maternity expenses/Sure Start Maternity Grant selected in SocFund**

**269. SFTYPE**

① If both code 1 and 2.

*Thinking about the money you received from Social Fund, was that a loan, or grant?*

- (1) *Loan*
- (2) *Grant*

**Asked is respondent has recorded a DWP loan or a Local Authority loan**

**270. SFGRNUM**

*How many such grants have you had in the past 13 months?*  
0..25

**Asked if respondent has recorded receiving a Grant in Social Fund**



**271. SFGRAM**

*How much did you receive all together?*

*0.00..997.00*

**Asked if respondent has recorded receiving a Grant in Social Fund**

**272. DVSFGR**

*DV for Social Fund Grant*

*0.00..997.00*

**Recorded when a DWP loan or a Local Authority loan selected in SocFund**

**273. SFLNTYPE**

① Short Term Advance are replacing Crisis Loan Alignment Payments from 2013 and are administered by DWP.

① Crisis Loans for general living expenses are administered by Local Authorities or devolved administrations from 2013

① If both code 1 and 2.

*Was it a budgeting loan or a Crisis loan/Short Term Advance?*

*(1) Budgeting Loan*

*(2) Crisis loan or Short Term Advance*

**Asked if respondent has recorded receiving a Loan in Social Fund**

**274. BLOANNUM**

*How many budgeting loans have you had in the past six months?*

*0..25*

**Asked if respondent has recorded receiving a budget loan in Social Fund loan type**

**275. BLOANAMT**

*How much did you receive altogether?*

*0.00..997.00*

**Asked if respondent has recorded receiving a budget loan in Social Fund loan type**

**276. CLOANNUM**

*How many Crisis loans / Short Term Advances have you had in the past six months?*

*0..25*

**Asked if respondent has recorded receiving a crisis loan in Social Fund loan type**

**277. CLOANAMT**

*How much did you receive altogether?*

0.00..997.00

**Asked if respondent has recorded receiving a crisis loan in Social Fund loan type**

**278. LALTYPE**

① If both code 1 and 2.

*Thinking about the money you received from your Local Authority, was that a loan, or a grant?*

(1) Loan

(2) Grant

**Asked if respondent has recorded receiving a Loan or Grant from Local Authority in OtherBen**

**279. LALNUM**

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

1..25

**Asked if respondent has recorded receiving a LA loan in Social Fund loan type**

**280. LALAMT**

*For this loan/these loans, how much did you receive altogether?*

0.00..997.00

**Asked if respondent has recorded receiving a LA loan in Social Fund loan type**

**281. LAGNUM**

*How many budgeting loans have you had in the past six months?*

1..25

**Asked if respondent has recorded receiving a LA grant in Social Fund loan type**

**282. LAGAMT**

*For this grant/these grants, how much did you receive altogether?*

0.00..997.00

**Asked if respondent has recorded receiving a LA grant in Social Fund loan type**

**283. DVSFBU**

*DV for Social Fund Budget Loan*

0.00..997.00

**Recorded when a DWP loan or a Local Authority loan selected in SocFund**

**284. DVSF CR***DV for Social Fund Crisis Loan**0.00..997.00***Recorded when a DWP loan or a Local Authority loan selected in SocFund****285. SFREPAY***Are you at present making any repayments on any Social Fund loans?**(1) Yes**(2) No***Asked if respondent was making repayments on a Social Fund loan from either Income Support, Jobseeker's Allowance, Employment and Support Allowance or from Pension Credits****286. REPAYAMT***① If repaying more than one loan give combined amount,  
How much in total do you repay, per week?**0.00..997.00***Asked if respondent was making repayments on a Social Fund loan from either Income Support, Jobseeker's Allowance, Employment and Support Allowance or from Pension Credits****287. SFINC***Just now, you said you received benefit last time. Was that amount before or after taking off Social Fund repayments?**(1) Before taking off amount for loan repayments**(2) After taking off amount for loan repayment***Asked if respondent was making repayments on a Social Fund****288. EXTBENAMT***① Enter the lump sum payment covering 4 weeks.  
How much was the extended payment?**0.00..997.00***Asked if respondent was making Extended Payment of Housing Benefit/Rent Rebate repayments in OtherBen****289. DVEXPAY***DV for Extended Payment of Housing Benefit**0.00..997.00***Recorded when Extended Payment of Housing Benefit selected in OtherBen**

**290. DVBEREV***DV for Bereavement Payment**0.00..997.00***Recorded when Bereavement Payment selected in OtherBen****291. DVUAD2***DV for Return to Universal Credit Payment**0.00..997.00***Recorded when Universal Credit Budgeting Advance selected in OtherBen****292. DVANISB***DV for Any NI or State Benefit not mentioned earlier.**0.00..997.00***Recorded when Any National Insurance or State Benefit not mentioned earlier selected in OtherBen****293. OTHPRES***Are you receiving (type of benefit) at present?**(1) Yes**(2) No***Asked if respondent was making Any National Insurance or State Benefit not mentioned earlier in OtherBen****294. OTHWEEKS***For how many weeks in the last 6 months have you received this benefit?**(1) Yes**(2) No***Asked if respondent was making Any National Insurance or State Benefit not mentioned earlier in OtherBen****295. DVSICK***0.00..997.00***Recorded when Statutory Sick Pay selected in Includ****296. DVMATST***0.00..997.00***Recorded when Statutory Maternity Pay selected in Includ**

**297. DVPATST***0.00..997.00***Recorded when Statutory Paternity Pay selected in Includ****298. DVADOPOST***0.00..997.00***Recorded when Statutory Adoption Pay selected in Includ****299. DVTAXRFD***0.00..997.00***Recorded when Income Tax Refund selected in Includ****300. DVMILALL***0.00..997.00***Recorded when Mileage Allowance or fixed allowance for motoring selected in Includ****301. DVMOTEXS***0.00..997.00***Recorded when Motoring Expenses Refund selected in Includ****302. DVWINT***0.00..997.00***Recorded when receiving a winter fuel payment****303. DVLAL***DV for Local Authority loan**0.00...997.00***Recorded when Loan selected in LALType****304. DVGAL***DV for Local Authority grant**0.00...997.00***Recorded when Grant selected in LALType**

## **Benefits received in combination**

### **305. DVTCom**

① Number of combined benefits received

0..40

**DVTCom = DVUCs+DVWTCs+DVCTCs+DVISs+DVJSAs+DVESAs+DVCAAs+DVPIPCars+DVPIPMobs+DVDLACars+DVDLAMobs+DVAAs+DVSDAs+DVIBs+DVIIDBs+DVPCs+DVSRPs+DVWids+DVAFCs+DVWWPs+DVCBs+DVGAs+DVMAAs+DVSFFExs+DVSFMats+DVBerevs+DVANISBs+DVSickP+DVMats+DVPats+DVAdops+DVTaxRf+DVMilAlw+DVMotEx+ DVWints**

### **306. COMBAM**

① This is where you collect information on the total amount of combined benefits. Enter the total of all benefits which are paid in combination. This includes different combinations of benefits. For example, if 2 benefits are paid together, and another two are paid together. These should be added together and the total entered here.

*You have stated that you receive some benefits in combination. How much did you get altogether last time?*

0.00..1502.00

**Asked if DVTCom is greater than one**

### **307. COMBPD**

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

**Asked if DVTCom is greater than one**

**And stated that receive some benefits in combination**

**308. TTBRPX**

① An approximate figure to the nearest pound is acceptable at this question.

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

**Asked if respondent has recorded receiving Other in Benefit or Disability Benefit or Pension Benefit or Child Benefit or Social Fund or Other Benefit**

**309. ININSUR (SC T3)**

*Do you currently receive any payments from any of these insurance schemes?*

Showcard (T3) options:

- (1) Unemployment/redundancy insurance
- (2) Trade Union sick pay or strike pay
- (3) Private medical scheme
- (4) Personal accident insurance
- (5) Permanent health insurance/income protection
- (6) Hospital Savings Scheme
- (7) Friendly Society sickness benefits
- (8) Critical illness cover
- (9) Any other sickness insurance
- (10) None of these

**310. AMTBENX**

① If amount not known because paid in combination with other benefits, enter dk and open note giving total amount, period and names of insurances covered

*What was the amount you last received?*

0.01..9997.00

**Asked for all insurances respondent has said they receive payments from at Inlsur**

**311. PERBENX**

*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

**Asked for all insurances respondent has said they receive payments from at InInsur and has stated amount of insurance payment they last received**

**312. DVREDINS**

*DV for unemployment/redundancy insurance*

0.00..997.00

**313. DVTRAD**

*DV for T.U. sick/strike pay*

0.00..997.00

**314. DVPRIV**

*DV for private medical scheme*

0.00..997.00

**315. DVACC**

*DV for personal accident insurance*

0.00..997.00

**316. DVPERM**

*DV for permanent health insurance*

0.00..997.00



**317. DVHOSP***DV for hospital savings scheme*

0.00..997.00

**318. DVTFRS***DV for friendly soc. sickness benefit*

0.00..997.00

**319. DVCRITIL***DV for critical illness cover*

0.00..997.00

**320. DVOTHINS***DV for any other sickness insurance*

0.00..997.00

**321. CWPAYMENT**

① This benefit of £25 is paid automatically when the temperature falls below zero degree Celsius for seven consecutive days.

*In the past 12 months since, have you received any Cold Weather Payments in your own right?*

- (1) Yes
- (2) No

**Asked if respondent receives either Pension Credit, Jobseeker's Allowance (JSA), Income Support or Employment and Support Allowance (ESA)**

**322. CWPAMT**

*How much have you received in total for the past 12 months?*

0.00..997.00

**Asked if respondent receives Cold Weather Payments**

**323. DVCWPAMT***DV for Cold Weather Payments*

0.00..997.00

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## PRIVATE PENSIONS

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**324. PENSINC (SC U1)**

① If yes, deal with each pension in turn

*Are you at present receiving an income from any of these sources?*

- (1) Yes
- (2) No

Showcard (U1) options:

- (1) An employee pension from a previous employer
- (2) A pension from employer of a deceased spouse or relative
- (3) A private personal pension
- (4) An annuity, home income plan, equity release plan
- (5) A pension as a member of a Trade Union or friendly society
- (6) A payment from a trust or covenant
- (7) A share of an employee or personal pension from an ex-spouse/partner/civil partner/as a result of a court order or settlement made on divorce
- (8) None of these

**325. PENSTYPE (SC U1)**

① Code all that apply

*Which type of pension is this?*

Showcard (U1) options:

- (1) An employee pension from a previous employer
- (2) A pension from employer of a deceased spouse or relative
- (3) A private personal pension
- (4) An annuity, home income plan, equity release plan
- (5) A pension as a member of a Trade Union or friendly society
- (6) A payment from a trust or covenant
- (7) A share of an employee or personal pension from an ex-spouse/partner/civil partner/as a result of a court order or settlement made on divorce

**Is asked for (up to) sixteen separate pension sources presently being received by respondent**

**326. INCAMT**

*How much did you receive last time?*

0.01..9997.00

**Is asked for (up to) sixteen separate pension sources presently being received by respondent**

**327. INCPD**

*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

**Is asked for (up to) sixteen separate pension sources presently being received by respondent**

**And if respondent has stated how much pension was received last time**

**328. DVINC**

*DV for INCAMT*

0.00..99997.00

**329. TAXED**

*Was tax deducted at source?*

- (1) Yes
- (2) No

**Is asked for (up to) sixteen separate pension sources presently being received by respondent**

**And if respondent has stated how much pension was received last time**

**330. TAXAMT**

*How much tax was deducted?*

0.01..99997.00

**Is asked for (up to) sixteen separate pension sources presently being received by respondent**

**And if respondent has stated how much pension was received last time**

**331. DVTAXA***DV for TAXAMT*

0.00..99997.00

**332. PTINC***Was the last payment before or after tax was deducted?*

(1) Before

(2) After

**Is asked for (up to) sixteen separate pension sources presently being received by respondent****And if tax was deducted from pension payment at source****333. PRVPANY***Do you have any other income from any of the sources on card U1?*

(1) Yes

(2) No

**Is asked for (up to) the first fifteen separate pension sources presently being received by respondent**

## OTHER INCOME

### 334. OTHIERN (SC U2)

① If Pension is in £, enter at previous pensions question

① Code all that apply

*In the last 12 months, have you received any income not yet mentioned from any of these sources?*

Showcard (U2) options:

- (1) Rent from any property
- (2) Royalties eg from land, books or performances
- (3) Income as a sleeping partner in a business
- (4) Occupational pension from an overseas government or company paid in foreign currency
- (5) None of these - Spontaneous only

### 335. RENRECAM

① Only rent received from separate properties is required here. Do not include rent received from lodgers

*How much did you receive for rent in the 12 months since [date], before deducting income tax but after deducting all allowable expenses?*

1..9999997

**Asked if respondent has received rent from property in the last 12 months**

### 336. DVREN

*DV for RENRECAM*

0.00..9999997.00

### 337. ROYALAMT

*How much have you received in royalties in the last 12 months?*

1..9999997

**Asked if respondent has received other income, not yet mentioned, in form of royalties eg from land, books or performances in the last 12 months**

### 338. DVROY

*DV for ROYALAMT*

0.00..9999997.0

**339. SLEEPAMT**

*How much have you received as income as a sleeping partner in the last 12 months?*

1..9999997

**Asked if respondent has received other income, not yet mentioned, as a sleeping partner in a business in the last 12 months**

**340. DVSLEE**

*DV for SLEEPAMT*

0.00..9999997.00

**341. FCPENAMT**

*How much have you received (in £) from a foreign currency pension in the last 12 months?*

1..9999997

**Asked if respondent has received other income, not yet mentioned, in form of an occupational pension from an overseas government or company, paid in foreign currency in the last 12 months**

**342. DVFCP**

*DV for FCPENAMT*

0.00..9999997.00

## ALLOWANCES

### 343. ALLTYPE (SC V)

① Include allowance from member of armed forces or merchant navy, an absent spender or non-resident spouse/civil partner

① Code all that apply

*Are you currently receiving any of the allowances shown on this card?*

Showcard (V) options:

- (1) Regular allowance from a member of your household who is temporarily absent
- (2) Child maintenance (include formal and informal payments)
- (3) Maintenance, alimony or separation allowance (exclude child maintenance)
- (4) Any other regular allowance from an individual who is not a member of this household
- (5) Allowance from a local authority for foster child
- (6) Allowance from a local authority for adopted child
- (7) Other regular allowance from an organisation
- (8) None of these

### 344. REGAM

*How much did you receive last time?*

1..9997.00

**Is asked if respondent stated at AllType that they are currently receiving a regular allowance from a member of their household who is temporarily absent**

### 345. REGPER

*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:

**Is asked if respondent has stated how much was received last time for their regular allowance from a member of their household who is temporarily absent**

**346. DVREG***DV for ALLRECAM*

0.00..9997.00

**347. MAINAM***How much did you receive last time?*

1.00..9997.00

**Is asked if respondent stated at AllType that they are currently receiving child maintenance**

**348. MAINPER***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:

**Is asked if respondent has stated how much child maintenance they received last time**

**349. DVMAIN***DV for ALLRECAM*

0.00..9997.00

**350. ALIMAM***How much did you receive last time?*

1.00..9997.00

**Is asked if respondent stated at AllType that they are currently receiving maintenance, alimony or separation allowance**

**351. ALIMPER**



*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:

**Is asked if respondent has stated how much maintenance, alimony or separation allowance they received last time**

**352. DVALIM**

*DV for ALLRECAM*

0.00..9997.00

**353. MAINAM**

*How much did you receive last time?*

1.00..9997.00

**Is asked if respondent stated at AllType that they are currently receiving any other allowance from an individual who is not a member of the household**

**354. MEMPER**

*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:

**Is asked if respondent has stated how much was received last time for any other allowance from an individual who is not a member of the household**

**355. DVMEM**

*DV for ALLRECAM*

0.00..9997.00

**356. FOSTAM**

*How much did you receive last time?*

1.00..9997.00

**Is asked if respondent stated at AllType that they are currently receiving an allowance from a local authority for a foster child**

**357. FOSTPER***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:

**Is asked if respondent has stated how much was received last time for an allowance from a local authority for a foster child**

**358. DVFOST***DV for ALLRECAM*

0.00..9997.00

**359. ADOPAM***How much did you receive last time?*

1.00..9997.00

**Is asked if respondent stated at AllType that they are currently receiving an allowance from a local authority for an adopted child**

**360. ADOPPER**

*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:

**Is asked if respondent has stated how much was received last time for their allowance from a local authority for an adopted child**

**361. DVADOP**

*DV for ALLRECAM*

0.00..9997.00

**362. OTHAM**

*How much did you receive last time?*

1.00..9997.00

**Is asked if respondent stated at AllType that they are currently receiving an 'other' regular allowance from an organisation**

**363. OTHPER***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:

**Is asked if respondent has stated how much was received last time for their ‘other’ regular allowance from an organisation**

**364. DVOTH***DV for ALLRECAM*

0.00..9997.00

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## INCOME TAX

---

**365. DIRTAX**

① Exclude capital gains tax

*(Apart from the tax payments you have mentioned), have you made any (other) income tax payments in the last 12 months?*

- (1) Yes
- (2) No

**366. DIRTAXAM**

*How much did you pay?*

1..9999997

**Asked if respondent has made some other income tax payments (not previously mentioned) in the last 12 months**

**367. DVDIRT**

*DV for DIRTAX*

0.00..9999997.00

**368. \*INCSRCE**

① Enter description

*What was the source of income on which you were taxed?*

STRING[up to 40 characters]

**Asked if respondent has made some other income tax payments (not previously mentioned) in the last 12 months**

**369. DIRTAXR**

*Has HMRC or DWP refunded any income tax direct to you in the last 12 months?*

- (1) Yes
- (2) No

**370. DIRTXRAM**

*How much was refunded?*

1..9999997

**Asked if some income tax has been refunded direct to respondent by HMRC or DWP in the last 12 months**

**371. DVDRT***DV for DIRTXRAM*

0.00..9999997.00

**372. PAYEREF***Was this a refund of tax deducted under PAYE?*

(1) Yes

(2) No

**Asked if some income tax has been refunded direct to respondent by HMRC or DWP in the last 12 months**

---

## MONEY SENT ABROAD

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**373. CASHAWAY**

① Include both occasional gifts & regular allowances

*In the last 12 months, have you sent any money abroad to a private individual?*

- (1) Yes
- (2) No

**374. CASHAMT**

*How much (in £) have you sent abroad to a private individual in the last 12 months?*

1..9999997

**Asked if respondent has sent money abroad to a private individual or charity in the last 12 months**

**375. DVPRI**

*DV for CASHAMT*

0.00..9999997.00



---

## ASSETS

---

**376. ASETTYPE (SC W1)**

① Code all that apply

*In the 12 months since [date], have you had any interest credited to any of the following accounts?*

Showcard (W1) options:

- (1) Individual Savings Account (ISA)
- (2) National Savings Easy Access Savings Account
- (3) National Savings Investment Account
- (4) Other savings account
- (5) Current account
- (6) Other account with a bank, building society, supermarket/store or other organisation
- (7) None of these

**377. ISAAMT**

① Record the combined interest from cash and securities (stocks & shares etc) accounts

*What was the total interest credited over the last 12 months?*

1..99997

**Asked if respondent has had interest credited to an ISA in the last 12 months**

**378. DVISA**

*DV for ISAAMT*

0.00..99997.00

**379. NT1JNT**

*Is this account (are the accounts) in your name only, or held jointly with someone else?*

- (1) Own name (only)
- (2) Joint (only)
- (3) Both sole and joint

**Asked if respondent has had interest credited to a National Savings Easy Access Account in the last 12 months**

**380. NTAMT**

① If amount not known, give estimate of interest

① For any joint accounts, only give this respondent's share of the interest

*What was the total interest credited over the last 12 months?*

1..99997

**Asked if respondent has had interest credited to a National Savings Easy Access Account in the last 12 months**

**381. DVNT**

*DV for NTAMT*

0.00..999997.00

**382. NT2JNT**

*Is this account (are these accounts) in your name only, or held jointly with someone else?*

(1) Own name (only)

(2) Joint (only)

(3) Both sole and joint

**Asked if respondent has had interest credited to a National Savings (Post Office) Investment account in the last 12 months**

**383. NTAMT**

① If amount not known, give estimate of interest

① For any joint accounts, only give this respondent's share of the interest

*What was the total interest credited over the last 12 months?*

1..99997

**Asked if respondent has had interest credited to a National Savings (Post Office) Investment account in the last 12 months**

**384. DVNS**

*DV for NSAMT*

0.00..99997.00

**385. OTHSVJNT**

*Is this account (are these accounts) in your name only, or held jointly with someone else?*

(1) Own name (only)

(2) Joint (only)

(3) Both sole and joint

**Asked if respondent has had interest credited to an 'Other savings account' in the last 12 months**

**386. OTHSVAMT**

- ① If amount not known, give estimate of interest
  - ① For any joint accounts, only give this respondent's share of the interest
- What was the total interest credited over the last 12 months?*  
1..99997

**Asked if respondent has had interest credited to an 'Other savings account' in the last 12 months**

**387. DVOTHSV**

*DV for NSAMT*

0.00..99997.00

**388. OTHSVTAX**

*Is the interest received AFTER or BEFORE tax?*

- (1) After tax
- (2) Before tax

**Asked if respondent has had interest credited to an 'Other savings account' in the last 12 months**

**389. CURJNT**

*Is this account (are these accounts) in your name only, or held jointly with someone else?*

- (1) Own name (only)
- (2) Joint (only)
- (3) Both sole and joint

**Asked if respondent has had interest credited to a Current Account in the last 12 months**

**390. CURAMT**

- ① If amount not known, give estimate of interest
  - ① For any joint accounts, only give this respondent's share of the interest
- What was the total interest credited over the last 12 months?*  
1..99997

**Asked if respondent has had interest credited to a Current Account in the last 12 months**

**391. DVCUR**

*DV for NSAMT*

0.00..99997.00

**392. CURTAX**

*Is the interest received AFTER or BEFORE tax?*

- (1) After tax
- (2) Before tax

**Asked if respondent has had interest credited to a Current Account in the last 12 months**

**393. BKJNT**

*Is the account (are these accounts) in your name only, or held jointly with someone else?*

- (1) Own name (only)
- (2) Joint (only)
- (3) Both sole and joint

**Asked if respondent has had interest credited to an 'other' account with a bank, building society, supermarket/store or other organisation in the last 12 months**

**394. BKAMT**

① If amount not known, give estimate of interest

① For any joint accounts only give this respondent's share of the interest

① Please include the total amount of interest credited in the last year from all bank accounts, excluding Current and Savings accounts

*What was the total interest credited over the last 12 months?*

1..99997

**Asked if respondent has had interest credited to an 'other' account with a bank, building society, supermarket/store or other organisation in the last 12 months**

**395. DVBK**

*DV for BKAMT*

0.00..99997.00

**396. BKTAX**

*Is the interest received AFTER or BEFORE tax?*

- (1) after tax
- (2) before tax

**Asked if respondent has had interest credited to an 'other' account with a bank, building society, supermarket/store or other organisation in the last 12 months**

**397. STKFILT (SC W2)**

① Stocks and shares ISAs should be recorded at the ISAs question

① Code all that apply

*Do you have now, or have you had in the last 12 months, income from any of these investments?*

Showcard (W2) options:

- (1) Government gilt-edged stock/ war loan
- (2) Unit and Investment Trusts
- (3) Other stocks, shares and bonds including National Savings Investment
- (4) None of these

**398. OTHJNT**

*Is it (are they) in your name only, or held jointly with someone else?*

- (1) Own name (only)
- (2) Joint (only)
- (3) Both sole and joint

**Asked if respondent currently has or has had in the last 12 months income from one or more of the investments listed in StkFilt**

**399. OTHAMT**

① If amount not known, give estimate of interest/dividend

① For any joint investments only give this respondent's share of the interest

*What was the total interest/dividend over the last 12 months?*

1..999997

**Asked if respondent currently has or has had in the last 12 months income from one or more of the investments listed in StkFilt**

**400. TAXTIME**

*Was the interest received after or before tax was deducted?*

- (1) After
- (2) Before

**Asked if respondent currently has or has had in the last 12 months income from one or more of the investments listed in StkFilt**

**401. DVOTH**

*DV for OTHAMT*

0.00..999997.00

**402. \*CHPARENT**

*Ask (one of the) adults responsible for [name] about the child's income*

1..1

**Is asked for all child members of the household**

**403. ASETCHI (SC X)**

①Code all that apply

*In the last 12 months, has [name] received any income from any of these sources?*

Showcard (X) options:

- (1) Interest on a bank account, building society account or any other savings account
- (2) Income from National Savings and Investments (e.g. Children's Bonus Bonds)
- (3) Interest or dividends from gilts, stocks, shares or other investment
- (4) Income from a trust fund
- (5) None of these

**Is asked for all child members of the household**

**404. CHIAMT**

*How much in total has [name] received from these sources in the last 12 months?*

0.01..9997.00

**Asked if child(ren) has/have received income from one of the sources listed at AsetChi**

**405. DVCHIL**

*DV for income received from child assets*

0.01..9997.00

**406. CHIJBN**

①Code all that apply

*And in the last 12 months since [date], has [name] received any money from a spare time job or any other source of income? Please exclude cash gifts, pocket money, inheritances and windfall gains.*

- (1) Spare time job
- (2) Other source of income (please specify)
- (3) None of these (spontaneous only)

**Is asked for households with a child over the age of five**

**407. CHISPE**

*Please describe the other source of income.*

STRING [up to 200 characters]

**Asked if child(ren) has/have received income from ‘other source of income’**

**408. CHDAMT**

*How much in total has [name] received from these sources in the last 12 months?*

0.01..9997.00

**Asked if child(ren) has/have received income from a spare time job or ‘other source of income’**

**409. DVCHD**

*DV for other child income*

0.01..9997.00

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## EXPENDITURE AND INCOME

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**410. \*FUND (SC Y)**

① Code all that apply

*The next question is concerned with sources of income or money that have not been covered already.*

*Looking at this card, which of these, if any, does your household use to sustain its current level of spending?*

Showcard (Y) options:

- (1) Credit/Store Card
- (2) Overdraft
- (3) Loans from friends/relatives
- (4) General purpose loans from other sources (e.g. payday loans)
- (5) Pawning possessions
- (6) Savings
- (7) Sale of assets (e.g. property, possessions, stocks, shares, bonds)
- (8) Redundancy payment
- (9) By other means, (please specify)
- (10) Current household income sufficient

**411. \*OTHERM**

*In what other way are/is your household able to sustain this level of spending?*

STRING[up to 40 characters]

**Asked if respondent states that household sustains its current level of spending by other means**



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