

## 7 Income interview

Taxperm = 0 question was not asked

Taxperm = 1 tax permission was given

Taxperm = 2 tax permission was refused

Taxperm = 3 does not file a tax return

Taxperm = 4 tax permission was withdrawn

Taxperm = 5 refused income will do labour

Taxperm = 9 not eligible (age < 16)

IN\_C001: If hhinfo.taxprm59 = 1 or 5, go to PT\_C001  
If hhinfo.taxprm59 = 0, 2, 3 or Blank, go to IN\_Q005  
If hhinfo-taxprm59 = 4, go to IN\_Q015

IN\_Q005: **The next part of this interview asks about different types of income and how much [Respondent] received over the past year, whether from work, retirement, or payments from government. It also asks about reductions to income, such as income tax.**

**In order to increase the accuracy of the data, [he] can give permission for Statistics Canada to access [his] income tax records. The information we obtain would be used for statistical purposes only, and would be kept confidential. No information that could be used to identify [him] will ever be provided to other departments or agencies.**

Do we have [his] permission?

The next part of this interview asks about different types of income and how much [Respondent] received over the past year, whether from work, retirement, or payments from government. It also asks about reductions to income, such as income tax.

In order to increase the accuracy of the data, [she] can give permission for Statistics Canada to access [her] income tax records. The information we obtain would be used for statistical purposes only, and would be kept confidential. No information that could be used to identify [her] will ever be provided to other departments or agencies.

Do we have [her] permission?

The next part of this interview asks about different types of income and how much [you] received over the past year, whether from work, retirement, or payments from government. It also asks about reductions to income, such as income tax.

In order to increase the accuracy of the data, [you] can give permission for Statistics Canada to access [your] income tax records. The information we obtain would be used for statistical purposes only, and would be kept confidential. No information that could be used to identify [you] will ever be provided to other departments or agencies.

Do we have [your] permission?

INTERVIEWER: If necessary, read the following:  
**Statistics Canada would obtain information from: the T1 Income Tax and Benefit Return, the T4 file of records from employers, the child tax benefit file and the GST Credit file.**  
**Any personal information we obtain will be kept strictly confidential according to the requirements of the *Statistics Act* -- not only names, but any other facts that could be used to identify a person or family.**

- |    |                            |               |
|----|----------------------------|---------------|
| 1. | Yes                        | go to PT_C001 |
| 2. | No                         | go to IN_Q015 |
| 3. | Does not file a tax return | go to IN_Q015 |

This is a mandatory question; 'Refuse' and 'Don't know' are not possible answers.

?IN\_Q015: INCOME FROM EMPLOYMENT

**Now I would like to proceed with the income portion of this survey. During [reference year], what was his income from the following sources?**

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**Now I would like to proceed with the income portion of this survey. During [reference year], what was your income from the following sources?**

**Wages and salaries from all jobs, before deductions, including tips and commissions.**

INTERVIEWER: Lines 101 and 104 on the tax return.  
An amount must be entered to continue. Enter 0 if respondent did not receive any income from this source.

If 0 is entered but an amount was reported in labour, WageFlag = 1 (CH\_Q251 = not empty) or (CH\_Q240 = 1 or 2) go to IN\_E015  
Otherwise go to IN\_Q020

Hard range: minimum: 0  
maximum: 99999995

Soft range: minimum: 1,000 (excluding 0)  
maximum: 100,000

IN\_E015: **Based on information provided previously, we expected an amount for wages and salaries. Did we miss it?**

?IN\_Q020: **Farm self-employment net income, including farm program payments and rebates, Canadian wheat board payments, crop insurance, etc.**

INTERVIEWER: Line 141  
An amount must be entered to continue. Enter 0 if respondent did not receive any income from this source.

Hard range: minimum: -9999995  
maximum: 9999995

Soft range: minimum: -5,000  
maximum: 100,000

?IN\_Q025: **Non-farm self-employment net income, including business, professional, commission and fishing net income.**

INTERVIEWER: Lines 122, 135, 137, 139 and 143  
An amount must be entered to continue. Enter 0 if respondent did not receive any income from this source.

Hard range: minimum: -9999995  
maximum: 9999995

Soft range: minimum: -5,000  
maximum: 150,000

?IN\_Q030: INVESTMENT INCOME

**Interest on bank accounts and other deposits, savings certificates, Canada Savings Bonds and other bonds, etc.**

INTERVIEWER: Line 121  
An amount must be entered to continue. Enter 0 if respondent did not receive any income from this source.

Hard range: minimum: 0  
maximum: 9999995

Soft range: minimum: 25 (excluding 0)  
maximum: 50,000

?IN\_Q035: **Dividends (taxable amount)**

INTERVIEWER: Line 120  
An amount must be entered to continue. Enter 0 if respondent did not receive any income from this source.

Hard range: minimum: 0  
maximum: 9999995

Soft range: minimum: 10 (excluding 0)  
maximum: 50,000

?IN\_Q040: **Taxable capital gains**

INTERVIEWER: Line 127  
An amount must be entered to continue. Enter 0 if respondent did not receive any income from this source.

Hard range: minimum: 0  
maximum: 9999995

Soft range: minimum: 25 (excluding 0)  
maximum: 50,000

?IN\_Q045: **Other investment income**

INTERVIEWER: Line 126  
An amount must be entered to continue. Enter 0 if respondent did not receive any income from this source.

Hard range: minimum: -9999995  
maximum: 9999995

Soft range: minimum: -1,000  
maximum: 50,000

?IN\_Q050: **INCOME FROM GOVERNMENT SOURCES**

**Canada Child Tax Benefit and provincial or territorial child tax credits or benefits**

INTERVIEWER: No line exists for this on tax return  
An amount must be entered to continue. Enter 0 if respondent did not receive any income from this source.

Hard range: minimum: 0  
maximum: 9999995

Soft range: minimum: 200 (excluding 0)  
maximum: 14,000 for Quebec  
9,000 for Ontario and BC  
7,000 for rest of Canada

IN\_Q060: **Old Age Security pension, Guaranteed Income Supplement, Spouse's allowance from the federal government**

INTERVIEWER: Exclude provincial supplements (report these with Social assistance, IN\_Q075)  
Lines 113 and 146; OR line 146 only for form T1S-B/T1S-C  
An amount must be entered to continue. Enter 0 if respondent did not receive any income from this source.

Hard range: minimum: 0  
maximum: 99999995

Soft range: minimum: 2,300 (excluding 0)  
maximum: 12,000

If an amount other than 0 is entered and age <60 go to IN\_E060  
If 0 is entered and age >64 go to IN\_E061  
Otherwise go to IN\_Q065

IN\_E060: **Normally this type of income is paid only to persons aged 60 and over. Could this be income from another source?**

IN\_E061: **Normally persons aged 65 or over receive income from the Old Age Security pension. Did we miss it?**

INTERVIEWER: Old Age Security is universal. (But the Guaranteed Income Supplement and Spouse's Allowance are not.)

?IN\_Q065: **Canada or Quebec Pension Plan benefits (CPP/QPP)**

INTERVIEWER: Line 114  
An amount must be entered to continue. Enter 0 if respondent did not receive any income from this source.

Hard range: minimum: 0  
maximum: 99999995

Soft range: minimum: 500 (excluding 0)  
maximum: 15,000

go to IN\_C070

IN\_C070: If CO\_Q010 = 1, go to IN\_Q070  
Otherwise, go to IN\_C075

?IN\_Q070: **Employment Insurance benefits**

INTERVIEWER: Line 119  
An amount must be entered to continue. Enter  
0 if respondent did not receive any income  
from this source.

Hard range: minimum: 0  
maximum: 99999995

Soft range: minimum: 500 (excluding 0)  
maximum: 22,500

If 0 is entered but an amount was reported  
in labour, UIFlg = 1 (CO\_Q010 = 1) go to IN\_E070  
Otherwise go to IN\_C075

IN\_E070: **Based on information provided previously, we expected an  
amount for Employment Insurance benefits. Did we miss it?**

go to IN\_C075

IN\_C075: If age > 69 or CO\_Q040 = 1, go to IN\_Q075  
Otherwise, go to IN\_C080

?IN\_Q075: **Social assistance and other income supplements from  
provincial or municipal sources**

INTERVIEWER: Line 145  
An amount must be entered to continue. Enter  
0 if respondent did not receive any income  
from this source.

Hard range: minimum: 0  
maximum: 99999995

Soft range: minimum: 300 (excluding 0)  
maximum: 25,000

If 0 is entered but an amount was reported  
in labour, SocAs = 1 (CO\_Q040 = 1) go to IN\_E075

Otherwise go to IN\_C080

IN\_E075: **Based on information provided previously, we expected an amount for Social Assistance. Did we miss it?**

go to IN\_C080

IN\_C080: If CO\_Q025 = 1, go to IN\_Q080  
Otherwise, go to IN\_Q085

?IN\_Q080: **Workers' compensation benefits**

INTERVIEWER: Line 144  
An amount must be entered to continue. Enter 0 if respondent did not receive any income from this source.

Hard range: minimum: 0  
maximum: 99999995

Soft range: minimum: 200 (excluding 0)  
maximum: 50,000

If 0 is entered but an amount was reported in labour, WorkCom = 1 (CO\_Q025 = 1) go to IN\_E080  
Otherwise go to IN\_Q085

IN\_E080: **Based on information provided previously, we expected an amount for Workers' compensation benefits. Did we miss it?**

IN\_Q085: **Goods and Services Tax/Harmonized Sales Tax (GST/HST) Credit**

INTERVIEWER: No line exists for this on tax return  
An amount must be entered to continue. Enter 0 if respondent did not receive any income from this source.

Hard range: minimum: 0  
maximum: 99999995

Soft range: minimum: 100 (excluding 0)  
maximum: 1,500

IN\_Q090: **Provincial and territorial tax credits**



INTERVIEWER: Line 479; OR lines 455, 456, 459, 460 and 462 on Quebec tax return  
An amount must be entered to continue. Enter 0 if respondent did not receive any income from this source.

Hard range: minimum: 0  
maximum: 99999995

Soft range: minimum: 25 (excluding 0)  
maximum: 3,000

IN\_Q095: **Veterans' Pensions and Civilian War Pensions and allowances**

INTERVIEWER: No line exists for this on tax return  
An amount must be entered to continue. Enter 0 if respondent did not receive any income from this source.

Hard range: minimum: 0  
maximum: 99999995

Soft range: minimum: 300 (excluding 0)  
maximum: 50,000

?IN\_Q100: **Other income from government sources (Specify)**

INTERVIEWER: Do not include the federal Energy Cost Benefit (it is already taken into account).  
Residents of Alberta: Do not include the \$400 Alberta Resource Rebate (it is already taken into account).  
An amount must be entered to continue. Enter 0 if respondent did not receive any income from this source.

Hard range: minimum: 0  
maximum: 99999995

Soft range: minimum: 100 (excluding 0)  
maximum: 25,000

IN\_N100: INTERVIEWER: Specify the source

01. Payments for individuals in fishing industry
02. Training allowance from federal or provincial governments



?IN\_Q115: **RRSP withdrawals**

INTERVIEWER: Line 129 if withdrawal and not pension  
An amount must be entered to continue. Enter  
0 if respondent did not receive any income  
from this source.

Hard range: minimum: 0  
maximum: 99999995

Soft range: minimum: 700 (excluding 0)  
maximum: 25,000

?IN\_Q125: **OTHER INCOME**

**Other income** (Specify)

INTERVIEWER: Line 130 plus any additional amounts  
An amount must be entered to continue. Enter  
0 if respondent did not receive any income  
from this source.

Hard range: minimum: 0  
maximum: 99999995

Soft range: minimum: 10 (excluding 0)  
maximum: 25,000

IN\_N125: INTERVIEWER: Specify the source

01. Scholarships, bursaries, fellowships, research grants
02. Settlements of life or other insurance policies
03. Retiring allowance and severance pay received from employer
04. Income from outside Canada (if not already reported)
05. Lottery and gambling winnings
06. Wage loss replacement benefits and income maintenance payments
07. Inheritance
08. Employer or union supplementary unemployment benefits
09. Payments from Children's Aid
10. Interest from loans and mortgages
11. Regular income from an estate or trust fund
12. Other (specify)
98. Refuse

99. Don't know

If response = 12 "Other (specify)" go to IN\_S125  
Otherwise go to IN\_Q140

IN\_S125: INTERVIEWER: Specify

Maximum: 80 characters

go to IN\_Q140

IN\_Q140: Total confirmation

**Based on the amounts reported, [including the amount received for support payments,] the computer has calculated the total income as \$[\*total income as calculated]. Does this sound about right?**

\*[Total income as calculated] is pre-filled with the total of items IN\_Q015 to IN\_Q125 plus SP\_Q005

If "strspnd" set in SP\_Q005, prefill the question text with "including the amount received for support payments,"

1. Yes
2. No
8. Refuse
9. Don't know

If yes go to IN\_Q145  
Otherwise go to IN\_Q141

IN\_Q141: **Can you give an estimate of his total income?**

**Can you give an estimate of her total income?**

**Can you give an estimate of your total income?**

INTERVIEWER: If no income in [reference year], enter 0.

Soft range: maximum 250,000

If entered 0 go to IN\_C150  
If amount entered is different from  
the total calculated by the computer go to IN\_E143  
Otherwise go to IN\_Q145

IN\_E143: **The computer calculated the total as \$[total income as calculated]. Could we review the amounts reported? Perhaps I made a mistake.**

go to IN\_Q145

?IN\_Q145: INCOME TAX

**INCOME TAX PAID on [reference year] income (federal, provincial and territorial)**

INTERVIEWER: All provinces except Quebec: Add lines 420 and 428.  
Quebec residents only: Add together line 420 of federal tax return and line 450 of Quebec tax return. Then subtract lines 445, 446 and 447 of Quebec return.  
If they did not file a return or did not calculate their taxes, ask them to report their best estimate.  
An amount must be entered to continue. Enter 0 if respondent did not pay any income tax.

Hard range: minimum: 0

go to IN\_C150

IN\_C150: If Hhinfo.Age59 > 69 go to PT\_C001  
Otherwise go to IN\_C155

IN\_C155: If FlagJobs = 1(DA\_Q001 = 1 or DA\_Q005 = 1 or DA\_Q010 = 1 or DA\_Q015 = 1) (job in reference year) go to IN\_C160

Otherwise (no job in reference year) go to PT\_C001

IN\_C160: If flag: PenPlan = 1, contributed to a pension plan (CH\_Q271 = 1) go to IN\_Q160

Otherwise, flag: PenPlan <> 1, did not contribute to a pension plan, or refuse, don't know or not stated in labour interview ((CH\_Q271 = 2) or (CH\_Q271 = empty/DK/RF)) go to IN\_C170

IN\_Q160: **In [reference year], what were his total employer pension plan contributions?**

**In [reference year], what were her total employer pension plan contributions?**

**In [reference year], what were your total employer pension plan contributions?**

INTERVIEWER: This is the Registered pension plan deduction.  
Line 207  
An amount must be entered to continue.

Hard range: minimum: 0  
maximum: 99999995

Soft range: min: 50  
max: 9,995

go to IN\_C170

IN\_C170: If flag: SelfEmp = 1, one or more jobs has  
Clwrk69 = 2 “self-employed”  
(CH\_Q011 = 1 and Hhinfo.Clwrk69 = 2) or  
(CH\_Q015 = 2) or (CH\_Q017 = 2) go to IN\_Q170

Otherwise go to IN\_C190

IN\_Q170: **In [reference year], did he pay professional membership dues or professional or malpractice liability insurance premiums?**

**In [reference year], did she pay professional membership dues or professional or malpractice liability insurance premiums?**

**In [reference year], did you pay professional membership dues or professional or malpractice liability insurance premiums?**

1. Yes
2. No
8. Refuse
9. Don't know

If Yes go to IN\_Q175  
Otherwise go to IN\_C190

IN\_Q175: **In [reference year], what was the amount he paid in professional membership dues or professional or malpractice liability insurance premiums?**

**In [reference year], what was the amount she paid in professional membership dues or professional or malpractice liability insurance premiums?**

**In [reference year], what was the amount you paid in professional membership dues or professional or malpractice liability insurance premiums?**

INTERVIEWER: On the tax return, this is 'Annual union, professional or like dues', Line 212. Please subtract the amount for union dues, if any.

Hard range: minimum: 0  
maximum: 99999995

Soft range: minimum: 10 (excluding 0)  
maximum: 9,995

go to IN\_C190

IN\_C190: If flag: UniMem = 1, union member or not a union member but covered by a union contract or collective agreement (CH\_Q260 = 1 or CH\_Q265 = 1) go to IN\_Q190

If flag: UniMem <> 1, not a union member and not covered by a union contract or collective agreement, or refuse, don't know, not stated in Labour interview ((CH\_Q260 = 2 and CH\_Q265 = 2) or (CH\_Q260 = empty/DK/RF)) go to PT\_C001

IN\_Q190: **In [reference year], what was the amount he paid in union dues?**

**In [reference year], what was the amount she paid in union dues?**

**In [reference year], what was the amount you paid in union dues?**

INTERVIEWER: On the tax return, this is 'Annual union, professional or like dues', Line 212. Please

subtract the amount for professional or like dues, if any.

An amount must be entered to continue. Enter 0 if respondent did not receive any income from this source.

Hard range: minimum: 0  
maximum: 99999995

Soft range: minimum: 10 (excluding 0)  
maximum: 2,000

go to PT\_C001

Licprm59 = 0 licence permission question was not asked  
Licprm59 = 1 licence permission was given  
Licprm59 = 2 licence permission was NOT given  
Licprm59 = 3 does not have a driver's licence (age > 15 and < 70)  
Licprm59 = 4 does not have a driver's licence (age > 69)  
Licprm59 = 5 licence permission was withdrawn  
Licprm59 = 6 licence permission was refused and respondent does not want to be asked again  
Licprm59 = 9 not eligible (age < 16)  
Licprm59 = Blank question is asked (joiner)

PT\_C001: If wave = "6" (last interview for panel), go to CAI\_SO  
Otherwise, go to PT\_C002

PT\_C002: If age59 < 80, go to PT\_C003  
Otherwise, go to CAI\_SO

PT\_C003: If Hhinfo.Licprm59 = Blank, 0, 2 or 3, go to PT\_Q001  
Otherwise (1, 4, 5, 6 or 9), go to CAI\_SO

PT\_Q001: **In case there are difficulties reaching [respondent], we would like [his] permission to use provincial drivers' licence files, for the sole purpose of finding [his] new address or telephone number. Does [respondent] give Statistics Canada permission to use these files?**

**In case there are difficulties reaching [respondent], we would like [her] permission to use provincial drivers' licence files, for the sole purpose of finding [her] new address or telephone number. [Does respondent] give Statistics Canada permission to use these files?**



**In case there are difficulties reaching [you], we would like [your] permission to use provincial drivers' licence files, for the sole purpose of finding [your] new address or telephone number. [Do you] give Statistics Canada permission to use these files?**

1. Yes
2. No
3. Does not have a driver's licence
8. Refuse
9. Don't know

go to CAI\_SO

CAI\_SO: INTERVIEWER: This is the end of the component. Return to previously answered questions to make any necessary corrections, or select <Exit> to exit the component.

## **7.1 Income edits**

Soft edits (other than the edits appearing in the questions above) were used during data collection.

### **Income amount check**

This edit was used during data collection to check the income source amounts entered by the interviewer.

When the amounts entered in the computer are outside the predetermined range, one of two error messages pop up: "**Amount seems too high**" or "**Amount seems too low**".

These messages appear when the amounts entered are outside the soft ranges shown in the questions above, which is determined using data collected in last year's SLID income interview. These ranges exclude approximately 5% of amounts below or above the selected limits.

The interviewer has the option to either 'Suppress' to confirm the value or 'Close' or 'Goto' to enter a new value.

## **7.2 On-line income help (F1)**

### **IN\_Q015: Wages and Salaries**

Include amounts called “Other employment income”, such as research grants (net of expenses) and income-maintenance insurance payments.

Exclude retirement and severance pay (report this in Other income, IN\_Q125).

### **IN\_Q020: Farm self-employment NET income**

This is receipts minus operating expenses, depreciation, and capital cost allowances.

If partnership, report only your share.

If incorporated, report this income in Wages and salaries (IN\_Q015) and/or Dividends (IN\_Q035).

Report net rent from farms leased to others in Other investment income, (IN\_Q045).

### **IN\_Q025: Non-farm self-employment**

This is receipts minus operating expenses, depreciation, and capital cost allowances.

If partnership, report only your share.

Include net income from roomers and boarders.

If incorporated, report this income in Wages and salaries (IN\_Q015) and/or Dividends (IN\_Q035).

### **IN\_Q030: Interest**

Include interest from Canadian and foreign sources, and foreign dividends. For joint accounts, report each person’s share separately.

### **IN\_Q035: Dividends**

Report taxable amounts received from Canadian corporations.

### **IN\_Q040: Taxable Capital Gains**

Report as for tax purposes.

### **IN\_Q045: Other investment income**

Include amounts such as:

- \* net rental income,
- \* rents for leased farm land,
- \* regular income from an estate or trust fund,
- \* cash dividends from life insurance policies, etc.

### **IN\_Q050: Child Tax Benefit**

Report only for the parent who receives the cheque.

Examples:

- \* Newfoundland and Labrador Child Benefit
- \* Nova Scotia Child Benefit
- \* New Brunswick Child Tax Benefit and Working Income Supplement
- \* Quebec family allowances
- \* Ontario Child Care Supplement for Working Families
- \* Alberta Family Employment Tax Credit
- \* Saskatchewan Child Benefit
- \* BC family bonus, BC Earned Income Benefit
- \* Yukon Child Benefit
- \* Northwest Territories Child Benefit and Territorial Worker's Supplement
- \* Nunavut Child Benefit and Territorial Worker's Supplement

**IN\_Q065: Canada or Quebec Pension**

Include all types, such as

- \* regular,
- \* disability,
- \* for a surviving spouse or child (death benefit)

**IN\_Q070: Employment Insurance benefits**

Include all types, such as

- \* regular
- \* sickness
- \* maternity/paternity
- \* work sharing
- \* training
- \* or for self-employed fishermen

**IN\_Q075: Social assistance**

Here are some EXAMPLES of the names of social assistance programs. There are many social assistance programs in Canada with many different names, depending on the municipality and province. Some are general, and others are for specific needs like child care, housing, health care expenses, or earnings supplements. This list does not reflect all the programs or their exact titles.

*Do not include programs which are specifically listed under question IN\_Q050, Child tax benefits.*

Social assistance program  
Welfare  
Income support program  
Income supplement program  
Day care subsidy  
Child welfare assistance  
Extended Benefits Program (EBP)

Financial Support Program (FSP)  
Residential assistance  
Work and Employment Incentive Program (WEIP)  
Parental Wage Assistance Program (PWA)  
Housing allowance  
LOGIRENTE  
GAINS  
Municipal assistance program  
Child Related Income Support Program (CRISP)  
55 Plus (Manitoba)  
Shelter Allowances for Elderly Renters (SAFER)  
Shelter Allowances for Family Renters (SAFFR)  
Saskatchewan Assistance Plan (SAP)  
Saskatchewan Income Plan (SIP)  
Support for persons with disabilities  
Special needs assistance  
Seniors benefit  
Seniors supplement

#### **IN\_Q080**

Workers' Compensation benefits from any provincial government compensation plan covering work-related injury or disability

#### **IN\_Q100**

Here are some examples of Income from Government Sources:

- Payments for individuals in fishing industry
- Training allowance from federal or provincial governments
- Cash property tax reductions and rebates
- Labour adjustment benefits
- Regular payments from provincial automobile insurance plans
- Quebec Maternity Allowance

#### **IN\_Q115: RRSP withdrawals**

Exclude tax-free withdrawals used for purchasing a home.

#### **IN\_Q125: Other income**

Exclude:

- \* proceeds from the sale of property, businesses, financial assets or personal belongings;
- \* income tax refunds
- \* loans received
- \* loans repaid to you as the lender
- \* refunds of contributions to work-related pension plans

#### **IN\_Q145: Income Tax Paid on income (federal, provincial and territorial)**

All provinces except Quebec:

- Add lines 420 and 428.

Quebec residents only:

- Add together:
  - Line 420 of federal tax return.
  - Line 450 of Quebec tax return
- Then subtract:
  - Line 445 (QPP contributions)
  - Line 446 (Contribution to health services fund)
  - Line 447 (Premium payable under the Quebec prescription drug insurance plan)

If they did not file a return or did not calculate their taxes, ask them to report their best estimate.