



# APIS

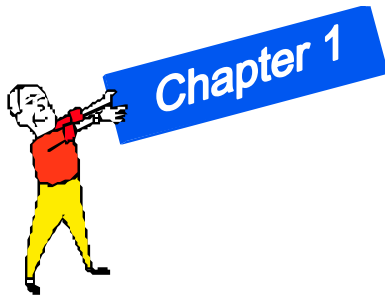
## Processing Manual

WB-ASEM: Redesigning the Annual Poverty Indicators Survey  
as a Poverty Monitoring Tool



NATIONAL STATISTICS OFFICE  
WORLD BANK





# General Processing Instructions and Pre-Editing Activities

## 1.1 Purpose of the Processing Manual

The processing manual for the Pretest on Redesigning Annual Poverty Indicators Survey (APIS) is prepared as a guide for processors in checking for the completeness and consistency of entries, and the reasonableness of data entered by interviewers into APIS Form 1. The manual is also designed to teach the processor how to make imputations if necessary, or in cases where entries in the questionnaire are required but were left blank, based on the remarks written by the interviewers and the reports of related items within the same questionnaire. The processor is given the full task of examining carefully and meticulously all the entries in the questionnaire. It is a job that requires patience, accuracy, honesty and a lot of common sense.

For efficient and quick editing, it is important that the processors are thoroughly familiar with the instructions given in the Interviewer's Manual, especially with the procedures in filling up the APIS questionnaires discussed in Chapter IV of the manual. Therefore, a thorough reading of the chapter is highly recommended prior to processing.

## 1.2 Flow of Processing Activity

In order to implement a systematic flow of the processing activities and reduce the movement of questionnaires from one employee to another, the same processor should be performing the following specific activities for the same folio.

1. General screening;
2. Editing and coding of APIS questionnaires and computations of totals ; and
3. General review of edited APIS questionnaire.

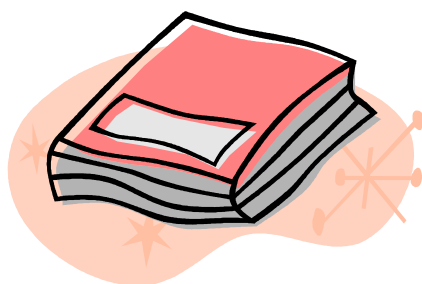




The supervisor should do the final review of the edited APIS questionnaires in the manually processed folio.

### 1.3 Folioing

To facilitate handling during manual and machine processing, APIS questionnaires shall be folioed in the Provincial Office before the start of manual processing.



One folio will contain all the questionnaires for the same EA. Accomplish the geographic identification portion of the folio cover (APIS Form 1B). Make sure that boxes for the geographic identification are completely filled out. The code for the region, province, city/municipality, barangay and EA will serve as the folio number, which is a 12-digit number.

The APIS questionnaires for one sample barangay/EA contained in the folio must be arranged consecutively according to the sample housing serial number (SHSN) from lowest to highest. A long folder should be used in covering the folio and shoelace should be used for binding it.

### 1.4 General Screening

General screening is done by going over the submitted accomplished questionnaires and checking for the completeness of the geographic identification and other information called for in the cover page.

General screening for APIS questionnaires should be done to ensure that the geographic and household identification and the entire sample households are the same with the MS Form 6.

Verify against the MS Form 6 (List of Sample Households) the codes indicated in the geographic identification portion of APIS questionnaire and the names



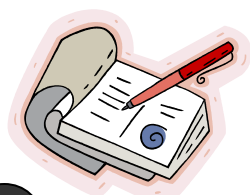
of the province, city/municipality and barangay if these are complete and correct. If the entries in the geographic identification portion of APIS Form 1 are not the same as those in MS Form 6, the latter shall prevail.

Be sure that the interviewer has printed and signed his name in the space provided. If the interviewer has not printed his name and has not provided his signature, inquire from the PSO, the name of the interviewer and write his name in print.

## 1.5 General Instructions on Manual Processing

The following instructions should be observed in manual processing.

1. Prior to editing and coding of items, check whether the questionnaires are properly folioed. Folioing should be done in the province. Regional Offices will check if folioing was done properly by the Provincial Offices.
2. All questionnaires for one folio should be assigned to only one editor/coder, unless otherwise necessary (e.g., when the one who is processing a folio is absent for more than a day).
3. Editing aids such as Interviewer's Manual, Occupation Codes (1994 PSIC/PSOC), Classification of Common Food Items, Average CPI Prices (for the province), calculator, etc., should be readily available.
4. The following prescribed ball pen colors should be observed during editing:
  - a. Blue ball pen - provincial office processors
  - b. Red ball pen - Team Supervisors (CO Stat., RDs, PSOs, Regional Statistician, Provincial Statistician, DSOs/SCOs)
5. In general, the editors should assume that the original entries are correct. Editing should be done only when an entry is obviously incorrect.
6. Under no circumstances, should erasures be made on the entries in the questionnaire made by the interviewers. Drawing a horizontal line through the original entry, and writing the correction above the original entry, keeping it within the proper space, should be performed when



correcting a wrong entry. Corrections should be written legibly.

Example:

48	500
<hr/>	
47.5	5000

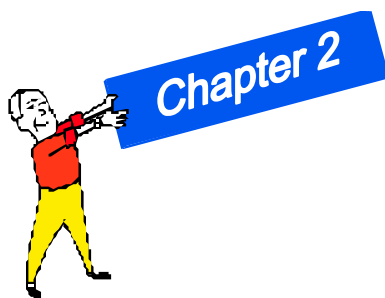
7. In correcting a wrong entry for a “Yes” or “No” answers, just draw a horizontal line across the wrong entry and encircle the correct code.

Example:

<del>1</del>	Yes	2	No
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8. For every “Yes” answer to the screening question of each sections (J – L) there must be corresponding details. If none, the entry should be changed to “No”.
9. Always examine any computation or remark made by the interviewers on the space at the right or left margin or at the bottom portion of the questionnaire for any clarification of doubtful entries.
10. Value and income in cash and/or in kind with “past six months,” or “past month” or “past week” as reference periods shall be reported in whole numbers or rounded to the nearest peso value.
11. Correct any entry that is misclassified and adjust the necessary computations.
12. Do not use small check marks to show that the entries are correct as these can be misinterpreted as “1”.
13. **No imputation** should be done unless entries in the computations/remarks space and/or related sections are explicit and specific.
14. If a DK or NR is found on the item, there should be a corresponding remark made by the interviewer explaining why he failed to get the entry. If none, ask the supervisor what action to take.
15. Determine and enter the code for occupation and all other entries which require codes.

16. Refer to the average prices obtained from the CPI in the province in checking the validity of the reported amount of the consumption/expenditure.
17. After editing/coding or verifying each questionnaire, the editor/coder/verifier must sign his name on the space provided in the folio cover.
18. For any doubtful entry where there are no explanations, refer to the APIS Interviewer's Manual or consult the assigned interviewer or supervisor. If he is no longer available and call back is not possible, do not attempt to change the entry. However, make a remark on the space provided to indicate that the entry is doubtful and explain why you say so.



## Editing of Items in the APIS Questionnaire

### 2.1 Section A Identification and other Information

The cover page of the questionnaire consists of Section A - Identification and Other Information. Entries in this part are copied from ISH Form 2 accomplished for the same sample household.

Editing of the Identification section is done during general screening. This includes checking as to the accuracy and consistency of codes with ISH Form 12 for the entries in the identification portion and accounting for completeness of sample households per barangay.

Correctness of the interview status should also be checked. Check if the encircled code for the result of final visit is the same as the code entered in the code box for final visit.

### 2.2 Section B Demographic Characteristics

Columns 3-6

Particulars about the Head and Members of the Family

Match the data/information about the head and family members in cols 2-6 with those entered in ISH Form 2. The source column from ISH Form 2 is indicated below for easy verification.

ITEM	Col. No. in APIS Form 1	Column Number in ISH Form 2
a. Name of Family Member	2	2
b. Sex	4	6
c. Age	5	7
d. Marital Status	6	8



## 2.3 Section C. Health Status

### Column 7

Injured or ill during the past month

The possible codes for this item are codes “1” to “4”. Check the consistency between the entry in this column with that in col. (8). Be sure that if code “1”, “2” or “3” is entered here, there is a corresponding entry of either “1” or “2” in col. (8). If code “4” is entered, col. (8) should have no entry.

### Column 8

Illness/injury was work-related

There should be an entry here if the family member is 5 years old and over and the answer in col. (7) is “1”, “2” or “3”. There should be no answer in this column if the entry in col. (7) is “4”.

### Column 9

Visited any health facility and type of visit

The possible entry for this item is either “1”, “2”, “3” or “4”. **There must be an entry in this column for each member.**

### Column 10

Type of health facility

More than one answer/entry is acceptable for this item. The possible codes are “1” to “6”. If code “4” is entered in col. (9) there should be no entry in this item.



## 2.4 Section D. Schooling Status (For 6-24 years old)

Column 11

Check (✓) mark for Family Members 6-24 years old

Column 12

Currently attending school

This item is answerable by “Yes” or “No”. The possible entry for this item is either “1” or “2”. If code “1” is entered there must be an entry in col. (13); if code “2”, the next applicable column is col. (14).

Column 13

Grade/Year currently attending

The entry for this item should be higher by one grade level than the entry in column (15a), except for those college graduates who are pursuing another degree. Codes “17”, “25”, “29”, “35” and “37” are not acceptable entries for this column.

Column 14

Reason for not attending school

The possible 2-digit code should be any of the codes from 01 to 10.

Column 15

Check (✓) Mark for Family Members 5 years old and over

Column 15a

Highest Educational Attainment (HGC)

Please refer to the different codes found at the bottom of page 3 of the questionnaire. Try to validate if the entry is acceptable against column (5) (Age as of last birthday). In case the person has been accelerated, his/her HGC may be up to three grade levels higher than the usual HGC by those of his/her age.

**Example:**

	Age	HGC
	08	11
accelerated	08	13

For Specified degree, refer to the coding manual for educational degrees.

## 2.5 Section E. Economic Characteristics

### Column 16

Worked or Had Job/Business at anytime from January 1 to June 30, 2004

All family members 5 years old and over should have an entry of either code “1” or “2” in this column.

### Column 17 and 17a

Salaries and Wages from Employment from January 1 to June 30, 2004

There should be entries in cols. (17) and (17a) for family members who had a job/occupation from January 1 to June 30, 2004 or with code “1” in col. (16). For doubtful entries see remarks and computation of interviewers and adjust entry/ies, accordingly.

### Column 18

**Hazardous Occupation**

There should be an entry of either code “1” or code “2” for family members 5 years old and over who had a job/business at anytime from January 1 to June 30, 2004 or with code “1” in col. (16).

### Column 19

Worked or Had Job/Business during the past week

All family members 5 years old and over should have an entry of either code “1” or code “2” in this column.

Column 20 and 20a

Primary Occupation/Business and Code

A brief description of the primary occupation should have been written by the interviewer in this column, for family members 5 years old and over. This will be the basis of the PSOC code in col. (20a).

Check if the 4 digit PSOC code entered in col. (20a) is consistent with and appropriate for the described activity in col. (20). Correct, if it is not.

Column 21 and 21a

Kind of Industry and Code

The kind of industry must be appropriate for the described occupation in col. (21). In case the name of company or office was written, you may refer to the latest List of Establishments of the province.

Check if the PSIC code entered in col. (21a) is correct, otherwise, enter the appropriate code.

Column 22

Class of Worker

Check if the code entered is consistent with the description in col. (20). Valid codes for this item is from 0 to 6.

Column 23

Nature of Employment

Check if the code is appropriate for the entries in col. (20) and (21).

**Example:** For a self-employed (code “3” in col. (22)  
like lavandera, entry for col. (23) is code “3”

### Column 24 Looked for Work in the Past Week

This column must have an entry of either code “1” or “2” if the entry in col. (19) is “2”. If the family member did not look for work in the past week, that is, with code “2” in this column, there must be an entry in col. (25).

### Column 25 Reason for Not Looking for Work

Valid code for this column is from 0 to 9. There should be an entry here if col. (24) has an entry of code “2”.

## 2.6 Section F. Housing Characteristics

### F1 Type of Building/House

Only one code should be entered in the code box. Valid code is 1 to 5.

### F2 Type of Construction Materials for the Roof

Valid code is 1 to 7. Check if the material of the roof is compatible with the type of building (F1). Codes “1” and “4” are compatible with codes 2 to 4 in F1. Code “7” is appropriate for code “5” in F1. Any of the codes 1 to 6 is applicable for a single house, code “1” in F1. Consult Supervisor or Interviewer if entry is not compatible with entry in F1.

### F3 Type of Construction Materials for the Outer Wall

Valid code is 1 to 7. Check if material of outer wall is compatible with type of building (F1). Consult Supervisor or Interviewer if entry is not compatible with entry in F1.



#### Tenure Status of the Housing Unit and Lot and Imputed Monthly Rental

See to it that only one code is entered in the box and the imputed monthly rental is reasonable and within the range of values prevailing in the area.



#### Floor Area

Determine if the value entered is really in square meters (sq.m.). The interviewer might have forgotten to convert the reported floor area from feet to meter in such a way that floor area will appear to be very large. Adjust accordingly.



#### Ownership of Housing Unit Elsewhere

Either code “1” or “2” is entered in the box. The imputed rental per month should be indicated if the entry in this item is “1”.



#### Acquisition of House and/or Lot thru Government Housing Program

Only code “1” or “2” should have been entered in the box.



#### Number of House(s) and/or Lot(s) Acquired thru Government Assistance

If code “1” is the answer in F4d, there should be an answer of at least “1” in the box provided.



#### Year when House & Lot was Acquired

For this item, the number of codes encircled and entered in the code boxes provided should be equal to the entry in F4e. If the answer in F4e is more than four, the entries in the code boxes provided in F4f should correspond to the four most recent of the years reported in this item.



### Ownership of Land Used for Purposes Other than Residence

Only code “1” or “2” should have been entered in the box. If code entered is “2”, skip to F5.



### Availment of CARP Land-Distribution Program

Either code “1” or “2” should have been entered in the box.



### Presence of Electricity

Either code “1” or “2” should have been entered in the box.



### Amenities/Conveniences Owned by the Family

All boxes should have an entry. If the answer for a particular item is none, enter “00”

## 2.7 Section G. Water and Sanitation



### Family's Main Source of Water Supply

Only one code should be entered in the box. Valid code is “11”, “12”, “13”, “21”, “22”, “31”, “32”, “33”, “41”, “51” and “96”. Check if the reported source is prevailing in the area, if not, refer to the remarks of interviewer.



### Distance of Main Source of Water Supply from House

This should only have an entry if any of the codes “11” to “33” has been entered in Family's Main Source of Water Supply (G1). If the family gets water from faucets inside

the house, connected to a water pipe line from either a community water system or a well, then write '0' in the line provided.



### Kind of Toilet Facility

**V**alid code is "11", "12", "21", "22", "31", "41", "51", and "96". Try to see if the reported type of toilet facility is consistent with the other characteristics of the housing unit, that is, if house is made of strong materials, code "11" or "12" is appropriate for this item. Consult Supervisor or Interviewer if entry is not compatible with other entries on housing.

## 2.5 Section H. Other Relevant Information



### Membership in any Health Insurance Plan (HIP)

**A**ll code boxes for this item should have an entry of either code "1" or "2". If any member of the family has code "1" in any type of HIP, then there should be an entry in Subsection I-3.11 Other Expenditures.



### Membership in any organization

**O**nly code "1" or "2" should be entered in the code box.

## 2.9 Section O. Changes in Welfare



Present Living Condition of the Family Compared to that in the last 12 months

The acceptable entry for this item is any of codes “1” to “3”.



Why Better off

This item should have an entry only if the answer to item O1 is Code “1” or Better Off. Otherwise, there is no entry for this item. The acceptable entry is any of the codes “1” to “8”.



Why Worse off

This item should have an entry only if the answer to item O1 is Code “2” or Worse Off. Otherwise, there is no entry for this item. The acceptable entry is any of the codes “1” to “9”.



Ways to cope up with the situation

This item should have an entry only if there is an answer in item O1.2. Otherwise, there is no entry for this item. Categories 1 to 6 should have an entry of either “1” for YES or “2” for NO. The code of “1” is entered in category 7 if there is a specified entry in this category.



Expectations of the family’s economic condition

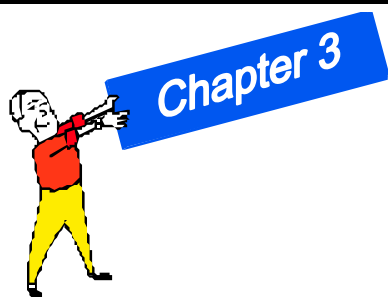
The acceptable entry for this item is any of the codes “1” to “3”.



Self-Assessment of family’s economic condition

The acceptable entry for this item is any of the codes “01” to “10”. The code of “01” represents the poorest and “10”, the richest.

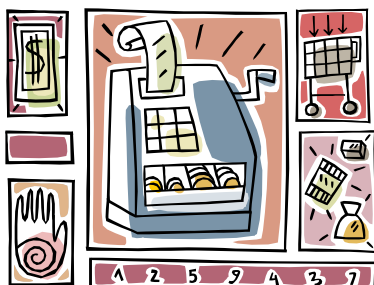




## Specific Instructions on Expenditure and Income

### 3.1 Section I Family Expenditures

The average food consumption of one family is listed in APIS Form 1A. For any inconsistency or incorrect entries refer to APIS Form 1A.



If the value consumed is reported but no quantity is indicated, try to validate the quantity given in the remarks portion.

It should be taken into account that the reference period for Sub-section I-1 Food, Alcoholic Beverages and Tobacco is “average/normal week”. Thus, examine whether the quantity reported for the particular item is a reasonable estimate of the weekly consumption of the family. Check also that the value is not too high or too low for the particular item by dividing the total value consumed by the quantity to arrive at an average CPI price in the province.

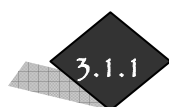
- i) If the quantity and value consumed for the week is too big
  - a. Look for any explanation written on the margin of the questionnaire. It may be that the family had frequent visitors during the semester, which accounts for the unusually high consumption.
  - b. If there is no written remark and the consumption is unusually high, consult the interviewer or the supervisor, if possible.
- ii) If the quantity and value consumed for the week is too small



- a. Accept the reported value consumed if there are other items, which the family may have consumed as substitutes, such as bread for rice.
- b. Refer to I-1.2 - Food Regularly Consumed outside the Home and if majority of the family members were eating outside the home, accept the reported values.

On the other hand, the reference period for Sub-sections I-2.1 (Fuel, Light and Water), I-2.2 (Transportation and Communication) I-2.3 (Household Operations) and I-2.4 (Personal Care and Effects) is the “past month”. Hence, the value reported should be equivalent to a month’s expenditure of the family. The remaining sub-sections, from Subsection I-3.1 (Clothing, Education, Medicines, etc.) to Sub-section I-3.12 (Other Disbursements), should reflect a six-month expenditure of the family since the reference period is “past semester”.

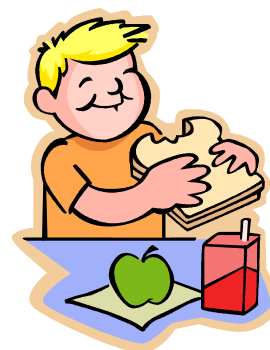
Make sure that the entries in the “In Kind” column have corresponding reports in the Value Consumed column in any of the following sections: Section J (Family Sustenance Activities); Section K (Net Share of Crops, Fruits and Vegetables Produced or Livestock Poultry Raised by other Households); or Section L (Entrepreneurial Activities). It should be noted that if a certain item was used/consumed both for household operations and for family-operated activity, the reported value consumed for that item should only be what was actually used or consumed by the family for the household operations (exclude items consumed for business activity/operation). Therefore, if the value consumed is too high or too low and unacceptable, the editor should always consult the assigned interviewer or supervisor for clarification purposes.



### Sub-section I-1 Food, Alcoholic Beverages and Tobacco

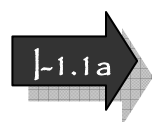
As mentioned earlier, the reference period for this section is “average/normal week” and values of items reported are actual consumption as distinguished from purchases. Entries in this section should be rounded off to the nearest peso.

Try to determine if consumption is ideal or acceptable as average consumption according to other factors such as number of members in the family and other consumed goods.



### I-1.1 Food Consumed At Home

**F**ood consumed at home consists mostly of rice or its substitute (corn, potato, camote, bread) and some viand (which can be vegetable, meat or fish). Thus, there should be a report on these items. Consult the interviewer if there are no entries for essential food items and no remarks whatsoever are written.

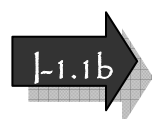


### Cereals and Cereal Preparations

**B**e guided by the instructions given in the Interviewer's Manual in checking the validity of the entries particularly for rice. As a general guide, a person may consume 2 to 5 kilogram of rice per week depending upon the age, sex composition and occupation of the family member. Refer to the composition of a family member by age and try to validate the entry.

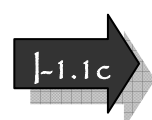
If the consumption of rice is low, see to it that higher intake for substitutes such as corn or bread is reported. Some members may also be regularly eating outside the home (See Subsection I-1.2).

Consumption for other items under this section may be minimal except when items are own-produced, from family sustenance or entrepreneurial activities.



### Roots and Tubers

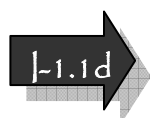
**M**ajority of Filipino families consume potatoes as a vegetable dish, and camote and cassava for snacks and merienda. However, there are certain sectors of the population who depend on roots and tubers as substitutes for rice. Expect higher consumption for this particular sector compared to other areas. For other areas, average weekly consumption of these crops may be minimal.



### Fruits and Vegetables

**V**erify if the value consumed by the family is within acceptable limits of prices for fruits or vegetables and on the number of family members, sex composition and occupation. If not, look for remarks or explanations. Imported fruits such as apples, grapes, oranges, etc. may have been purchased or received as gifts on a regular basis from a balikbayan relative or friend.

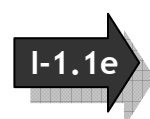
Again, if there are no remarks or explanations consult the assigned interviewer. Otherwise, put a note on the space provided to indicate that the entry is doubtful.



### Meat and Meat Preparations

**A**ssess prices as the unit price of meat items available in the market if reasonable. The level of consumption should also be assessed in relation to the size and composition of the family.

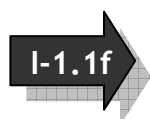
There are certain sectors of the population that do not consume meat. In such a case, look for remarks or any explanation. If none, verify from the interviewer whether he asked for the average weekly consumption or not. If he did not, instruct the interviewer to revisit the family and ask this section together with the rest of the sections, which need clarifications/corrections.



### Dairy Products and Eggs

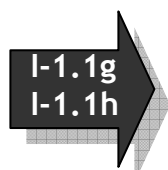
**R**efer to the family composition in Section B if there is a family member less than 1 year old. In such a case, expect consumption for milk. Milk consumption may vary depending on whether the infant is breastfed or not. If there is no reported value, look for explanations. If none, consult the assigned interviewer.

However, accept an entry for milk even when there are no children in the family.



### Fish and Marine Products

**F**amilies in fishing villages or with members engaged in fishing activity generally consume more than the normal intake due to the abundance of fish and marine products in the area. However, for non-fishing villages in mountainous areas, consumption for fish may be minimal.



### Coffee, Cocoa and Tea and Non-alcoholic Beverages

**A**ssess the unit price and level of consumption of the family on items under these two sub-sections. There may be households who do not report any consumption for coffee, tea, cocoa and non-alcoholic beverages during the week, look for explanation for such.

**I-1.1i**

**Food Not Elsewhere Classified**

*F*ood items under this section are mostly consumed in combination with other items earlier enumerated. For example, if there is reported consumption for coffee, cocoa, tea, expect that there is some consumption of sugar. Similarly salt, patis or toyo are used as regular seasoning for everyday meals.

If there is no reported consumption for this section and there are no remarks and /or explanations, consult the assigned interviewer.

**I-1.2**

**Food Regularly Consumed Outside the Home**

*I*f there is no value consumed for this item, review family membership as to the presence of students and employed persons. These are usually the members who eat outside the house on a regular basis. In this case, consult the interviewer or the designated PO supervisor.

**I-1.3**

**Alcoholic Beverages**

*M*ake sure that the reported value consumed is within reasonable limits. If reported value is too high, explanations like, there are regular drinking sessions among members of the family even without any occasion, may be accepted. Note also that unusually high consumption on alcoholic beverages may be due to some special family occasion. In this case, the value should not be reported under this section, but in Section I-3.9, Special Family Occasions.

**I-1.4**

**Tobacco**



*N*ot all families are expected to report consumption of cigars and cigarettes. If there is report on value consumed, make sure that the unit price is within acceptable limits, though if the brand used by the family member is an imported one, it is expected that there is a higher price or the value consumed for this item reported price is much higher.

Light smokers consume only 1 to 2 sticks a day or even less while heavy smokers may consume a pack (20 sticks) or more of cigarettes a day.

**3.1.2**

**Sub-section I-2**

**Fuel, Light and Water, Transportation  
and Communication and Household Operations**

## I-2.1

**Fuel, Light and Water**

These items, i.e., charcoal, firewood, LPG, petroleum products and electricity are normally used as fuel for cooking. Therefore, it is very unlikely that item I-2.1 has no entry. If there is no entry in this item, do the following:

1. Look for remarks or any explanation.
2. Consult the interviewer and/or the supervisor assigned to this particular household.

Verify also the consistency of value consumed in kind by doing the following:

1. Check if there are consumed items which are own-produced from Section J-1.2 Family Sustenance Activities (logging, gathering forest products like firewood) and take note of the value.
2. Check also if there are consumed items, which are own-produced from Section L-4b.1 Entrepreneurial Activities, Forestry and Hunting (charcoal and firewood).
3. Value consumed in kind in I-2.1 multiplied by six should equal to the sum of value consumed from Family Sustenance (J-1.2) and Entrepreneurial Activities (L-4b.1).
4. If not equal, adjust the total to conform to details.

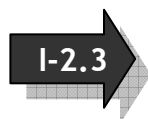
If gasoline was reported in I-3.12 Others (Item g) and a corresponding remark states that the gasoline was used for a generator to run electricity in this house, then transfer this amount to electricity in Subsection (I-2.1) in the In Cash/On Credit column, if the gasoline was purchased, or in the "In Kind" column if received free. On the other hand, if there is no remark and electricity in (I-2.1) is blank and item 5 under Housing (Section F) has an entry of "1" (Yes), indicating the presence of electricity in the household, inquire from the interviewer if the gasoline is used for electricity.

If there is no expenditure in electricity under I-2.1, encircle code 2 in Question 5 of Section F. Housing, or F5. Also, if the code of the source of water supply in G1 is any of the codes 11, 12, 13 and 51, there should be an expenditure on water in Sub-section I-2.1, otherwise, accept only if there are acceptable remarks.

## I-2.2

**Transportation and Communication**

If the family owns a car as reported in F-6.f, (ownership of housing conveniences) ascertain the reasonableness of entries in personal transport expenses, i. e., gasoline/diesel, maintenance and repair. If the entries are too high, suspect possibility that expenses for business operations have been included. Look for any explanation and consult the interviewer/supervisor.



## Household Operations

*I*f there is no consumption for laundry soap and detergent, check for remarks in the space provided for it. If there is none, inquire from the interviewer.

If the value reported is quite low, consult the interviewer assigned. Note also that the value of new clothing, shoes, etc. bought by the family during the past six months and given as gifts to domestic help should be included in the cash/on credit column of I-2.3.

**I-2.4****Personal Care and Effect**

If there is no consumption in this sub-section, check for any relevant information in the spaces for computation and remarks. If there is none, inquire from the interviewer.

Verify reasonableness of entries based on the remarks/explanations indicated and considering the family size. Compute for per capita expenditure (total expenditure for I-2.4 divided by family size) and compare with per capita expenditure of other families in the area. Watch out for high values particularly for articles received from abroad.

**3.1.3****Sub-section I-3.1 Clothing, Education, Taxes, Medicines and Others****I-3.1****Clothing, Footwear and Other Wear**

Expenses for clothing and other ready made apparel and footwear for the past six months should be entered here.

**I-3.2****Education**

If one or more family members were reported as currently attending school in column 12, expect entries in this section. If there is none, look for remarks written by interviewers or consult interviewer or supervisor.

**I-3.3****Recreation and****I-3.4****Medical Care**

Not all families may have incurred expenses for recreation and medical care. Thus, it is possible that these items are blank. On the other hand, if there are entries reported as purchased in cash, check that these entries are reasonable compared to income received by the family members.

All benefits of an employee such as free hospitalization, free medicines, free check ups, are classified under in cash/on credit column. Thus, if there is an entry in Section E col. (17a), Salaries and Wages in "In kind" column, then there should be a corresponding entry in "in cash/on credit column in item I-3.3.



I-3.5

### Non-Durable Furnishings

Not every family may have incurred any expenses or received anything as gifts in this section. If there are entries reported as purchased in cash, check that these entries are reasonable compared to income received by the family members

I-3.6

### Durable Furniture and Equipment

The reported value of items purchased in cash should be more or less the prevailing price.

I-3.7

### Taxes

Verify that the value reported is the amount of tax paid and not the total income by comparing with current income for the semester. If there is no entry in Income Tax, verify from the SR concerned. Note that income tax is directly related to total gross income. Check the consistency of the reported income tax with the earnings of the family members. If the reported value is too low or too high compared to the earnings of the members, inquire from the interviewer.

If the family owns a car or a house and/or lot as reported in Sub-sections F-6.f and F-4.a, expect entries in real estate tax and car registration fees.

If the value is doubtful, verify from the interviewer as to what particular direct taxes this value pertains to. If the family was engaged in any entrepreneurial activity, he might have included business taxes in this section, which should be included as operating cost in the corresponding activity in Section L - Entrepreneurial Activities.

I-3.8

### House Maintenance and Repairs

Refer to computations/remarks space for any explanation or details, which could be used to check or edit the reasonableness of entries such as cost of paid labor, paints, etc.

Verify from the written remarks or from the interviewer if the value reported in this item is very high. Determine from the remarks of the interviewer as to what kind of repair or construction was done. However, if the repairs made are not those specified in the Interviewer's Manual (as the case may be classified as major repair), transfer the value to Section I-3.12 item g (Other Disbursements).

I-3.9

**Special Family Occasions**

See if entries are reasonable.

I-3.10

**Gifts and Contributions to Others**

If there are entries in the “In Kind” column for this item, and there are no entries in “Value Given Away as Gifts” in Sub-sections L-1 to L-4, Entrepreneurial Activities, ask the interviewer about this inconsistency. However, if the said sub-sections have entries in the column “Value Given Away as Gifts”, check that the sum of the entries in the “In Kind” column of this item is equal to or greater than the sum of “Value Given Away as Gifts” in Sub-sections L-1 to L-4. Any inconsistency should be corrected.

I-3.11

**Other Expenditures**

There should be an entry in this item if there is a family member who is a regular wage earner or member of any Health Insurance Plan.

I-3.12

**Other Disbursements**

If the value of amount deposited in banks/investments for “Other Disbursements” appears to be doubtful for the sample family, verify the entry from the interviewer. The respondent might have reported the total accumulated deposits/investments as of June 30, 2004 which may include deposits/investments made earlier than January 2004 when the report should include only the actual value deposited/invested by the family during the reference period (January-June 2004).

## 3.2 INCOME

3.2.1

**Section E Cols. 17 and 17a****Salaries and Wages from Employment**

For family members 5 years old and over who worked or had job/business at anytime from January 01 to June 30, 2004 (with entry of 1 in column 16) and worked in the past week for private household, private establishment, or government agency, or worked with pay in family-operated farm or business, these columns are expected to have entries.

In case there are no entries, the editor should take note of this for referral to the assigned interviewer. A possible revisit shall be done to determine the necessary information for this section.



**Section J    Family Sustenance Activities (FSA)**

**I**n no case will the “Net Receipts” column be left blank whenever there is an entry in the column for “Value Consumed”. Otherwise, copy the same amount to the “Net Receipts” column. However, if both have entries, verify the values in the two columns. Value consumed is generally less than the value of net receipts. However, it may happen that the value consumed is greater than receipts as in the case of a household who raised chicken and consumed it during the reference period. Watch out for occurrences of the same activity in both family sustenance and entrepreneurial activities. If so, transfer the entries from family sustenance activities to the particular entrepreneurial activity after verifying that the entries are not exact duplicates. Otherwise, delete the entries under FSA to avoid double reporting.

Include here instructions to transfer FSA to Entrepreneurial Activities if value of Total Net Receipts exceeds a particular amount.

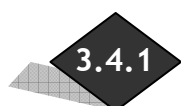
**3.3            Section K            Net share of Crops, Fruits and Vegetables  
Produced or Livestock and Poultry Raised by  
other Households**

**T**otal net value of share should be greater than or equal to the sum of value sold for cash and value consumed. If the net value of share is greater, it means that there are some stocks on hand or given away as gifts. Otherwise, if the sum of sold for cash and value consumed is greater than the total value, ascertain which is more likely to be correct and adjust values correspondingly. Refer to computations/remarks for any explanation for doubtful entries and consult the supervisor.

### 3.4 Section L Entrepreneurial Activities

*I*t should be noted that question (a) in a particular activity can be marked “Yes” although there may be no production/harvest/catch or sales reported.

If the answer in question (a) is NO and no entries are found in the particular section, then (b) and (c) should be left blank.



#### Sub-sections L1

**Crop Farming and Gardening**

**L2 Livestock and Poultry Raising**

**L3 Fishing**

**L4. Forestry and Hunting**

*S*ee to it that all values are reported to the nearest peso. If an entry is with centavo, line out the value and round it off using the odd even rule. See to it that the totals are equal to sums of details. Assess the reasonableness of entries by comparing the total quantity with the total value of production in case both are given. Also, the sum of the “value consumed” and “value given away as gifts” columns may be less than the “Total Value” column if there are some stocks on hand. Check for the correctness of column totals and line totals for question (c) i.e., in cash + In Kind = Total. In the shaded area provided for the computation of net income, see to it that the Value and Total Cost given are consistent with those computed from (b) and (c), respectively. In case the net income is negative, look for an explanation in the space provided for the computations/remarks. If none, refer the matter to the supervisor.

For these sub-sections, expenses will be reported only if there were production/harvest/catch/disposal made during the reference period. Therefore, if there are entries under expenses but none in the latter, verify from the interviewer what are these expenses for. Cancel these entries if there were really no production/harvest/catch/disposal during the past semester.



#### Sub-sections L5

**Wholesale and Retail**

**L6. Manufacturing**

**L7. Community, Social, Recreational and Personal Services**

**L8. Transportation, Storage and Communication Services**

**L9 Mining and Quarrying**

**L10 Construction and**

**L11 Entrepreneurial Activities NEC**

**I**n the boxes provided for the number of months of operation, for sub-sections L5 to L8, make sure that those provided for the decimal portion are filled up. For instance, if the family engaged in wholesale/retail activity for approximately 5  $\frac{1}{4}$  months, the entry in the box provided should be 5.25. If on the other hand, the operation lasted for exactly 5 months, the entry should be 5.00. Check also that the reported number of months should not exceed 6.00.

It may be possible that only the Total Sales/Receipts has an entry while the average gross sales/receipts per month and the number of months is left blank. In such cases, assume a six months operation and divide total sales/receipts by 6 to get an average gross sales/receipts per month. However, if the number of months is reported, use this value as the divisor, instead of assuming 6 months. On the other hand, if only the average gross sales/receipts per month are entered, compute for the total sales/receipts by multiplying the value by the number of months of operation. In case both the average gross sales/receipts per month and the total sales/receipts are present but the computation is wrong, re-compute the total sales/receipts.

The indicated major activity of the family will be used to check the reasonableness of gross sales/receipts and consumption and/or expenses reported in the section. The code in sub-sections L6 and L11 (Manufacturing and Entrepreneurial Activities NEC) refers to the main/primary activity and should be coded accordingly using the 1994 PSIC.

Be sure that the total sales/receipts and total costs entered in the shaded area provided for the computation of net income are consistent with each of the grand totals reported in (b) and (c). If Total Sales/Receipts is not equal to the sum of details, verify from the remarks portion/ask SR.



### **Section M Other Sources of Income**

**I**f entries reported are in foreign currencies (dollar, riyals, etc), convert entries to peso equivalent using prevailing exchange rates at the time of receipt particularly for cash received from family members working abroad. For doubtful entries, cross verify with total expenses incurred during the reference period or see remarks for any explanation and consults the supervisor.

Determine from the source of income specified in Other Sources of Income Not Elsewhere Classified (Section M7) whether it can be further classified to other specific sources of income. Take note that copra making is not to be reported under this section but rather in manufacturing or crop farming (if integral part of an activity in coconut farm) in family sustenance or entrepreneurial activity, as the case maybe.



**Section N    Other Receipts**

*R*efer to remarks/computations space for any explanation, which could be used to edit entries and consult interviewer or supervisor for doubtful entries.

For item (6) Loans from Business Firms and Government Institutions, make sure that the unpaid amount for an appliance/furniture bought on an installment basis during the reference period is reported here.

