

OFFICE EDITING GUIDELINES

2003 BLES Integrated Survey



Republic of the Philippines
DEPARTMENT OF LABOR AND EMPLOYMENT
Bureau of Labor and Employment Statistics
Intramuros, Manila



August 2003

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OFFICE EDITING GUIDELINES

Office editing guidelines are useful in reviewing the completeness and consistency of submitted survey data. These guidelines are prepared to help Reviewers detect and correct errors in the accomplished questionnaires to ensure processing of correct information.

General Instructions

- a) Any attachments by the establishment should be stapled on the pertinent page of the questionnaire. The corresponding **EIN** should be written on the upper right hand corner of each page of the attachment.
- b) The **comments** of the respondent on p.14 of the questionnaire should be read as these may provide explanations relevant to the accomplished questionnaire.
- c) Use violet ballpoint in editing.

If during the questionnaire review, **inconsistent** entries are noted in NCR questionnaires, these should be encircled, and the Reviewer should accomplish the verification forms (BITS Form 1), return the questionnaires together with the respective verification form to the concerned Supervisor for verification of concerned Enumerator.

Likewise, inconsistent entries in the accomplished questionnaires from the Regional Offices should also be encircled by the Reviewer, accomplish the verification forms and the questionnaires returned to the concerned Regional Supervisor/s for verification through the Senior LEO responsible for the Regional Office.

However, if minimal inconsistent entries are observed in a particular section/s, e.g. Part II item 1, the Reviewer should photocopy the section containing the encircled entries for verification. Indicate the name, address and EIN of the establishment on the upper left hand portion of the questionnaire. The Senior LEO shall fax this together with the accomplished verification forms to the Regional Supervisor concerned.

- d) If the reported employment is at least 16 in **any** of the reference periods (Part I item 3 for CY 2002 and Part II item 1 for June 30, 2003), accept for processing. This questionnaire should be coded as RET by the Reviewer. Otherwise, discontinue review. However, the GEO code in the address label and PSIC code in Part I item 2 for June 30, 2003 should be updated as applicable.
- e) Entry by the respondent that needs to be revised should not be erased or obliterated. The original entry should be lined out neatly. The correct/new entry should be legibly written close to the crossed out entry. Indicate date of verification close to the verified entry.
- f) Where there are no numeric values to report, entry should be "0" or "-". If entry is NA, NAP, None, line out and write "0" or "-".
- g) Where entry refers to unclassified category, i.e. "Others", complete description of the entry should be provided as it is possible that it could be classified in the given categories.
- h) Where details are provided, these should add up to respective totals. In case of discrepancy, sum of details should prevail over reported total.
- i) Unless **explicitly** stated in these guidelines, the Reviewer should **not** make consistency checks between sections, e.g. Part II and Part V as they have different reference periods.
- j) If problems arise, the Reviewer should **consult** his/her Senior LEO while the latter his/her Supervising LEO.

Cover Page

- a) If there is a **change in the GEO code**, Supervisor should cross out neatly GEO code in address label and write under it the new GEO code. If the barangay is not indicated, barangay code is "000".
- b) If there are any **changes in the name and address** of the sample establishment, the Enumerator should have filled out the space/s right after the label as specified. **There should be no markings on the pre-addressed label** other than the revised GEO code to be indicated by the Supervisor only.
- c) If the questionnaire is to be accomplished by the **head office**, the Enumerator should have likewise filled out the allocated spaces as specified. Otherwise, return questionnaire to the concerned Enumerator through his/her Supervisor for proper accomplishment (NCR).
- d) At the bottom of the page are codes that will reflect the status of the questionnaire. The Reviewer should accomplish the portion applicable to BLES.

If status is OSE (for both reference periods), write beside it the total employment reported in Part II item 1 for June 30, 2003. If status is DUP, write beside it the EIN of its duplicate establishment. In the case of OSP or OTH status, write beside it the PSIC code based on June 30, 2003.

Note: Entries for verification in the establishment should be in accordance with item c of General Instructions.

PART I : General Information

ITEM OF INQUIRY	GUIDELINES
<p>1. Main economic activity</p> <p>2. Major products/goods or services</p>	<ul style="list-style-type: none"> • The main economic activity should be completely described in col. 2 (June 30, 2003) and col. 3 (CY 2002). • Major products/goods or services should be specified in cols. 2 and 3 to allow for affirmation of PSIC code in the address label or its re-coding if necessary. • If there is no change in PSIC code in the address label, copy/write the code close to the entry for major products/goods or services in item 2 (cols. 2 and 3). • If there is change in PSIC code, write the new PSIC code close to the entry for major products/goods or services in item 2 (cols. 2 or 3) as the case maybe.
<p>3. Average employment</p>	<ul style="list-style-type: none"> • There should be entry only in col. 3. • This refers to the average number of employees, working owners whether they receive regular pay or not and unpaid workers. • If the reported employment is at least 16, accept for processing.
<p>4. Average number of employees</p>	<ul style="list-style-type: none"> • There should be entry only in col. 3. • This refers to all employees including working owners with regular pay. • In establishments engaged in bus line operation, entries in this item include employees paid purely on commission basis but under employer control and supervision. • Entry should not exceed corresponding number of employed persons reported in item 3.
<p>5. Norma/regular working hours per day for majority of employees</p>	<ul style="list-style-type: none"> • There should only be one encircled answer in each column. • If “Others” was encircled, the answer should be specified.
<p>6. Days actually worked during the year for majority of employees</p>	<ul style="list-style-type: none"> • There should only be one encircled answer in col. 3. • If “Others” was encircled, the answer should be specified.
<p>7. Days not worked but considered paid during the year for majority of employees</p>	<ul style="list-style-type: none"> • There should only be one encircled answer in col. 3. • Entry here refers to the days not worked, e.g. Sundays or rest days, special days and regular holidays. • If “Others” was encircled, the answer should be specified. <p><i>Note: The sum of entries in items 6 and 7 should not exceed 365 days.</i></p>
<p>8. Ownership</p>	<ul style="list-style-type: none"> • There should only be one box checked in each column.

ITEM OF INQUIRY	GUIDELINES																																																																												
<p>9. Multinational</p>	<ul style="list-style-type: none"> • There should only be one box checked in each column. • If “Yes” is checked, nationality/ies should be provided and write corresponding code beside it. • The following are the countries and their corresponding codes: <table border="1" data-bbox="591 415 1250 1171"> <thead> <tr> <th>Country</th> <th>Code</th> <th>Country</th> <th>Code</th> </tr> </thead> <tbody> <tr><td>Australia</td><td>au</td><td>Malaysia</td><td>my</td></tr> <tr><td>Belgium</td><td>be</td><td>Netherlands</td><td>nl</td></tr> <tr><td>Brazil</td><td>br</td><td>New Zealand</td><td>nz</td></tr> <tr><td>Brunei</td><td>bn</td><td>Norway</td><td>no</td></tr> <tr><td>Canada</td><td>ca</td><td>Philippines</td><td>ph</td></tr> <tr><td>China</td><td>cn</td><td>Russia</td><td>ru</td></tr> <tr><td>Denmark</td><td>dk</td><td>Saudi Arabia</td><td>sa</td></tr> <tr><td>Finland</td><td>fi</td><td>Singapore</td><td>sg</td></tr> <tr><td>France</td><td>fr</td><td>Spain</td><td>es</td></tr> <tr><td>Germany</td><td>ge</td><td>Sweden</td><td>se</td></tr> <tr><td>Hongkong</td><td>hk</td><td>Switzerland</td><td>ch</td></tr> <tr><td>India</td><td>in</td><td>Taiwan</td><td>tw</td></tr> <tr><td>Indonesia</td><td>id</td><td>Thailand</td><td>th</td></tr> <tr><td>Ireland</td><td>ie</td><td>Turkey</td><td>tr</td></tr> <tr><td>Israel</td><td>il</td><td>United Arab Emirates</td><td>ae</td></tr> <tr><td>Italy</td><td>it</td><td>United Kingdom</td><td>uk</td></tr> <tr><td>Japan</td><td>jp</td><td>United States of America</td><td>us</td></tr> <tr><td>South Korea</td><td>kr</td><td>Others</td><td>ot</td></tr> </tbody> </table>	Country	Code	Country	Code	Australia	au	Malaysia	my	Belgium	be	Netherlands	nl	Brazil	br	New Zealand	nz	Brunei	bn	Norway	no	Canada	ca	Philippines	ph	China	cn	Russia	ru	Denmark	dk	Saudi Arabia	sa	Finland	fi	Singapore	sg	France	fr	Spain	es	Germany	ge	Sweden	se	Hongkong	hk	Switzerland	ch	India	in	Taiwan	tw	Indonesia	id	Thailand	th	Ireland	ie	Turkey	tr	Israel	il	United Arab Emirates	ae	Italy	it	United Kingdom	uk	Japan	jp	United States of America	us	South Korea	kr	Others	ot
Country	Code	Country	Code																																																																										
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South Korea	kr	Others	ot																																																																										
<p>10. Market</p>	<ul style="list-style-type: none"> • There should only be one box checked in each column. • Private Education and Private Health and Social Work (Industry M and N, respectively) may answer “Domestic only”. 																																																																												
<p>11. With Union</p>	<ul style="list-style-type: none"> • There should only be one box checked in each column. • If “Yes” is checked in col. 2, items 12 to 14 must have entries. • If “Yes” is checked in col. 3, item 12.3 must have an entry. • If “No” is checked in cols. 2 and 3, there should be no entries in the rest of the succeeding items. Go to Part II. • However, if there are entries in any of the items 12 to 14, verify if response is still a “No”. If it is “Yes”, edit as instructed. 																																																																												
<p>12. Number of Unions*</p>	<ul style="list-style-type: none"> • If there are any entries in items 12 to 14 (col. 2a), these should be the sum of the corresponding entries in cols. 2b and 2c. 																																																																												

* Additional col: **Others** (2d) to accommodate neither supervisory or rank and file unions.

ITEM OF INQUIRY	GUIDELINES
12.1. Registered	<ul style="list-style-type: none"> • Entries here (cols. 2a, 2b and 2c) should not exceed corresponding entries in item 12.
12.2. Exclusive bargaining agents	<ul style="list-style-type: none"> • Entries here (cols. 2a, 2b and 2c) should not exceed corresponding entries in item 12.
12.3. With collective bargaining agreements	<ul style="list-style-type: none"> • Entries here (cols. 2a, 2b and 2c) should not exceed corresponding entries in item 12. • If answer is “Yes” in item 11 col. 3 (CY 2002), there should only be one box checked in this item.
13. Union membership**	<ul style="list-style-type: none"> • Entries in cols. 2a, 2b and 2c should be greater than “0” if there are corresponding unions reported in item 12 (cols. 2a, 2b and 2c). • Entry in col. 2b should not exceed number of supervisors/ foremen reported in Part II, item 1.3.2. • Entry in col. 2c should not exceed number of rank and file reported in Part II, item 1.3.3.
13.1. Female members	<ul style="list-style-type: none"> • Entries in cols. 2a, 2b and 2c should not exceed corresponding entries in item 13. • Entry in col. 2a should not exceed number of female employees reported in Part II, item 2.1.
13.2. Union Officers	<ul style="list-style-type: none"> • There should be entry in cols. 2a, 2b and 2c if there are corresponding entries in item 13 (cols. 2a, 2b and 2c). • Entries in cols. 2a, 2b and 2c should not exceed corresponding entries in item 13.
13.2.1. Female officers	<ul style="list-style-type: none"> • There can only be female officers if there are female union members (item 13.1). • Entries in cols. 2a, 2b and 2c should not exceed corresponding entries in item 13.1.
13.2.1.1. Female presidents	<ul style="list-style-type: none"> • There can only be female presidents if there are female union officers (item 13.2.1). • Entries in cols. 2a, 2b and 2c should not exceed corresponding entries in item 13.2.1
14. Workers covered by CBA	<ul style="list-style-type: none"> • Entries in cols. 2a, 2b and 2c should be greater than “0” if there are corresponding CBAs reported in item 12.3 (cols. 2a, 2b and 2c). • Workers covered by CBA may exceed corresponding union membership in item 13 (cols. 2a, 2b and 2c). • Entry in col. 2b should not exceed number of supervisors/foremen reported in Part II, item 1.3.2. • Entry in col. 2c should not exceed number of rank and file reported in Part II, item 1.3.3

** If combined unions, details on membership and CBA coverage should be in col. 2d.

PART II: Employment

ITEM OF INQUIRY	GUIDELINES
1. Total Employment	<ul style="list-style-type: none"> • There should be entry here. • This refers to the total employed (including working owners not receiving regular pay and unpaid workers) covered by the payroll period that includes June 30, 2003. • In establishments engaged in transport, this item also includes employees paid purely on commission basis but under employer control and supervision, e.g. bus drivers. • Entry should be the sum of entries in items 1.1, 1.2 and 1.3. • If the reported employment is at least 16, accept for processing.
1.1. Working owners	<ul style="list-style-type: none"> • Entry refers to working owners not receiving regular pay. • Entry should be less than entry in item 1.3.
1.2. Unpaid workers	<ul style="list-style-type: none"> • Accept with or without entry. • Entry refers to apprentices/learners/trainees without regular pay and those who worked for at least one-third of the working time normal to the establishment but do not receive regular pay. • Entry should be less than entry in item 1.3.
1.3. Employees	<ul style="list-style-type: none"> • This refers to total employees including working owners receiving regular pay. • In establishments engaged in transport, this item also includes employees paid purely on commission basis but under employer control and supervision, e.g. bus drivers. • Entry should be the sum of entries in items 1.3.1, 1.3.2 and 1.3.3. • This is also the sum of entries in items 2.4 to 2.8 and 2.9.3*
1.3.1. Managers/Executives	<ul style="list-style-type: none"> • Entry includes working owners receiving regular pay. • The proportion of managers/executives should not be more than 20 percent of total employment. If entry is not within range, verify.
1.3.2. Supervisors/Foremen	<ul style="list-style-type: none"> • The proportion of supervisors/foremen should not be more than 30 percent of total employment. If entry is not within range, verify.
1.3.3. Rank and file	<ul style="list-style-type: none"> • Entry refers to the number of technical, production staff and all other employees not occupying managerial or supervisory/foremen positions. • Entry should be the sum of entries in items 1.3.3.1 and 1.3.3.2.
1.3.3.1. Regular workers	<ul style="list-style-type: none"> • Entry refers to workers on permanent status in the establishment (i.e. no fixed date of termination of contract). • Entry should be less than entry in item 1.3.3.

* An additional item included for editing purposes to ensure coverage of those workers paid purely on commission but within employer control and supervision as in the case of bus drivers.

ITEM OF INQUIRY	GUIDELINES
1.3.3.2. Non-regular workers	<ul style="list-style-type: none"> • Entry refers to probationary workers, casual workers, contractual/project-based workers except agency-hired workers, seasonal workers and paid apprentices/learners/trainees who are hired for a fixed duration of employment. • Entry should be the same entry as that in item 2.10.
2. Employment of Specific Groups of Employees	<ul style="list-style-type: none"> • As applicable, workers may be reported in several categories.
2.1. Female workers	<ul style="list-style-type: none"> • Entry may be equal to or less than entry in item 1.3.
2.2. Workers paid the minimum wage	<ul style="list-style-type: none"> • Entry should be the number of workers paid exactly the minimum wage rate fixed by the Regional Tripartite Wages and Productivity Board (RTWPB). • Entry may be equal to or less than entry in item 1.3.3.
2.3. Persons with disabilities 2.4. Time-rate workers	<ul style="list-style-type: none"> • Accept with or without entry. • If there is entry, it should be less than entry in item 1.3. • Entry should be the number of workers paid on the basis of time unit of work such as an hour, a day or a month. They may be working as full-time or part-time workers(e.g. university teachers) and are hired on a permanent/regular or non-regular status. • Entry should be the sum of entries in items 2.4.1 and 2.4.2.
2.4.1. Full-time workers	<ul style="list-style-type: none"> • Entry refers to the number of workers who work with the establishment for at least 40 hours. • Entry should be the sum of entries in item 2.4.1.1, 2.4.1.2 and 2.4.1.3.
2.4.1.1. Hourly	<ul style="list-style-type: none"> • Entry refers to the number of workers working full-time whose remuneration are based on the number of hours worked. • Entry should be less than entry in item 2.4.1. However, it is equal to entry in item 2.4.1 if there are no daily or monthly workers.
2.4.1.2. Daily	<ul style="list-style-type: none"> • Entry refers to the number of workers working full-time whose remuneration are based on a per day basis. • Entry should be less than entry in item 2.4.1. However, it is equal to entry in item 2.4.1 if there are no hourly or monthly workers.
2.4.1.3. Monthly	<ul style="list-style-type: none"> • Entry refers to the number of workers working full-time whose remuneration are based on monthly basis. • Entry should be less than entry in item 2.4.1. However, it is equal to entry in item 2.4.1 if there are no hourly or daily workers.

ITEM OF INQUIRY	GUIDELINES
2.4.2. Part-time workers	<ul style="list-style-type: none"> • Entry refers to the number of workers who work less than the working time normal to the establishment. • Entry excludes consultants and those on retainer basis (e.g. lawyers). • Entry should be less than entry in item 2.4.
2.5. Piece-rate workers 2.6. Quota workers 2.7. “Pakyao” or “Takay” workers 2.8. Task workers	<ul style="list-style-type: none"> • Accept with or without entry. • Items 2.5 to 2.8 refer to output-based workers who may be hired on a permanent/regular or non-regular status. Entries may be equal to or less than entry in item 1.3.3. These group of workers are classified by establishment as non-regular workers when hired only during business peak periods or for a fixed duration of employment.
2.9. Commission workers 2.9.1. With basic pay and commission	<ul style="list-style-type: none"> • Accept with or without entry. • Entry should be the sum of entries in items 2.9.1, 2.9.2 and 2.9.3* • Establishments engaged in insurance, real estate selling and trade would normally have entries in items 2.9.1 and/or 2.9.2. • Accept with or without entry. • As these are considered employees of the establishment and may have been classified as time-rate workers, entry should be less than entry in item 2.4. Entry is equal to entry in item 2.9 if there are no entries in items 2.9.2 and 2.9.3.
2.9.2 Purely on Commission (without employer control or supervision)	<ul style="list-style-type: none"> • Accept with or without entry. • Entry should be less than the entry in item 2.9. However, it is equal to entry in item 2.9 if there are no entries in items 2.9.1 and 2.9.3. • In establishment engaged in transport, transfer entry, if any, to item 2.9.3, then line out original entry.
2.9.3. Purely on Commission (with employer control or supervision) <i>Note: Additional item</i>	<ul style="list-style-type: none"> • Accept with or without entry. • Entry should be less than the entry in item 2.9. However, it is equal to entry in item 2.9 if there are no entries in items 2.9.1 and 2.9.2.
2.10. Non-regular workers	<ul style="list-style-type: none"> • Entries should be the sum of entries in items 2.10.1, 2.10.2, 2.10.3, 2.10.4 and 2.10.5. • In case entry here is different from that in item 1.3.3.2, sum of details should prevail. Adjust accordingly affected entries, e.g. items 1.3.3, 1.3 and item 1.

* An additional item included for editing purposes to ensure coverage of those workers paid purely on commission but within employer control and supervision as in the case of bus drivers.

ITEM OF INQUIRY	GUIDELINES									
2.10.1. Probationary workers	<ul style="list-style-type: none"> • Accept with or without entry. • Entry refers to the number of workers who work with the establishment on trial period usually 6 months, during which the employer determines their fitness to qualify for a regular/permanent employment. 									
2.10.2. Casual workers	<ul style="list-style-type: none"> • Accept with or without entry. 									
2.10.3. Contractual/project-based workers	<ul style="list-style-type: none"> • Accept with or without entry. • Entry excludes agency-hired workers, consultants and those on retainer basis. 									
2.10.4. Seasonal workers	<ul style="list-style-type: none"> • Accept with or without entry. • Entry pertains to workers hired for a short period usually in recurring periods of peak business activity. 									
2.10.5. Paid apprentices/learners	<ul style="list-style-type: none"> • Accept with or without entry. • Entry should exclude apprentices/learners/trainees without regular pay. 									
2.11. Workers who work on shifts	<ul style="list-style-type: none"> • Accept with or without entry. • Entry should be the sum of number of workers by shift in item 2.11.1 (col. 2). • Entry should be less than entry in item 1.3. 									
2.11.1. Number of shifts Number of workers by shift	<ul style="list-style-type: none"> • Number of shifts should be greater than 1. It is the total number of shift schedules reported in col. 1b. • In establishments other than call centers, time of shift work should exclude the regular working time schedules of administrative workers (e.g. 7-4; 7:30-4:30; 8-5; 8:30-5:30;9-6; 9:30-6:30) • Thus, any period of time commencing before the start of the regular working schedule or any time that falls outside the regular working schedule is considered as shift work. <p><i>Examples:</i></p> <table border="1" data-bbox="613 1142 1253 1226"> <tbody> <tr> <td>Day shift</td> <td>5:30 AM – 1:30 PM</td> <td>6:00 AM – 2:00 PM</td> </tr> <tr> <td>Afternoon shift</td> <td>1:30 PM – 9:30 PM</td> <td>2:00 PM – 10:00 PM</td> </tr> <tr> <td>Night shift</td> <td>9:30 PM – 5:30 AM</td> <td>10:00 PM – 6:00 AM</td> </tr> </tbody> </table> <ul style="list-style-type: none"> • Entries in col. 2 is the corresponding number of workers in the various time shifts reported in col. 1b. • In establishments engaged in provision of security and janitorial services (in hospitals), shift schedules and corresponding workers deployed in the establishments whom agencies serve should be reflected here. 	Day shift	5:30 AM – 1:30 PM	6:00 AM – 2:00 PM	Afternoon shift	1:30 PM – 9:30 PM	2:00 PM – 10:00 PM	Night shift	9:30 PM – 5:30 AM	10:00 PM – 6:00 AM
Day shift	5:30 AM – 1:30 PM	6:00 AM – 2:00 PM								
Afternoon shift	1:30 PM – 9:30 PM	2:00 PM – 10:00 PM								
Night shift	9:30 PM – 5:30 AM	10:00 PM – 6:00 AM								
2.12. Engaged in contracting	<ul style="list-style-type: none"> • There should only be one box checked in this item. 									

ITEM OF INQUIRY	GUIDELINES
<p>2.13. Jobs contracted out</p>	<ul style="list-style-type: none"> • If “Yes” is checked in item 2.12, there should at least be one checked box here. • Establishment engaged in the provision of security and janitorial services should not have checked boxes corresponding to codes 01 and 02 as it is unlikely that these establishments will contract out their security and janitorial needs to other establishments engaged in the same line of business. If the boxes have been checked, line out the entries. • If these are the only checked boxes by the security and janitorial agencies, line out “Yes” in item 2.12 and check “No”. • A job contracted out as checked here may not necessarily have an entry for the same job in item 2.14 (jobs performed within establishment premises). • If “Others” is checked, jobs contracted out must be specified.
<p>2.14. Agency-hired workers <i>(contract out jobs performed within establishment premises)</i></p>	<ul style="list-style-type: none"> • Establishments engaged in the provision of security and janitorial services must not have entries in items 2.14.2 and 2.14.3 for the same reason stated above. If there are, line out entries. • If there is entry in any of the jobs contracted out in this item, the same jobs in item 2.13 should be checked. • If “Others” is checked, jobs contracted out and corresponding number of workers must be specified. • Entries should add up to total.

PART III: Industrial Relations Practices

ITEM OF INQUIRY	GUIDELINES
<p>1. Where do you source applicants for vacancies in the establishment?</p> <p>2. How are these vacancies announced?</p>	<ul style="list-style-type: none"> • Multiple responses are acceptable for each occupational category. <p><i>Notes:</i> Skilled operatives are those production/construction workers who have received formal training-in-service or in an institution for at least three (3) months, or who have more than five (5) years experience in the particular craft they are in. For instance, maintenance specialists, toolmakers or tool setters, machine operators, assemblers, etc. Unskilled operatives are those production /construction workers who have received less than two weeks of training in the job they are performing. For instance, cleaners, machine tenders, general factory workers, laboratory attendants, etc.</p> <ul style="list-style-type: none"> • There should only be one response for each method of announcing vacancies. • If code 08 (Others) is checked, the answer other than those enumerated should be specified.
<p>3. What criteria are used in hiring employees?</p>	<ul style="list-style-type: none"> • There should be entries in the criteria for each occupational category corresponding to item 1.
<p>4. What methods are used in fixing or revising wages and salaries of employees?</p>	<ul style="list-style-type: none"> • Multiple responses are acceptable for each position. • There must be check mark as applicable in col. 3 if there is entry in Part II, item 1.3.1. However, there should be no check mark for code 01. Otherwise, line out entry. • There must be check mark as applicable in col. 4 if there is entry in Part II, item 1.3.2. • There must be check mark as applicable in col. 5 if there is entry in Part II, item 1.3.3.1. • There must be check mark as applicable in col. 6 if there is entry in Part II, item 1.3.3.2. • If code 06 (Others) has entry/ies, the answer other than those enumerated above should be specified.
<p>5. How many employees are covered by the following benefits/schemes?</p>	<ul style="list-style-type: none"> • There must be entry in all types of benefits/schemes. If no worker is covered, write "0". • Entries here do not refer to those who have availed of the benefits/schemes but to the benefits/schemes that workers can avail of. • Accept no entry after verification that mandatory benefits such as code 13 (maternity leave), code 14 (paternity leave), code 15 (service incentive leave), code 40 (13th month pay), code 61 (compulsory social security schemes), code 67 (Retirement pay) and code 68 (Separation/Termination pay) are not granted. • Accept entry if less than number of employees reported in Part II item 1.3.

ITEM OF INQUIRY	GUIDELINES
<p>5. How many employees are covered by the following benefits/schemes? (cont'd)</p>	<ul style="list-style-type: none"> • Entry in code 13 (Maternity leave) should not exceed number of female employees reported in Part II item 2.1. • Entry in code 14 (Paternity leave) should not exceed number of male employees. This is equal to number of employees in Part II item 1.3 less number of female employees in Part II item 2.1 • For the rest of the benefits, entries should not exceed number of employees reported in Part II, item 1.3. For doubtful entries, verify. • If (Others) has entry/ies in the number of workers covered, the benefit/scheme other than those enumerated should be specified. Write the corresponding code to be written in col. 4 beside the benefit scheme as follows: 19 (Other leave benefits); 43 (Other allowances, bonuses and gratuities); 69 (Other Social Security schemes and 90 (Other –Other benefit/schemes).
<p>6. How many employees were given job-related training in 2002?</p>	<ul style="list-style-type: none"> • Job-related trainings include training invitations coming from other establishments free of charge. • Details should add up to total. • Employees provided training should not exceed number of employees reported in Part I, item 4 for CY 2002. • If there were no job-related trainings reported in 2002, write “0” in each box and go to Item 10. • However, if there are check marks in items 7, 8 (“Yes” columns) and item 9, there should be entries in this item.
<p>7. Which of the following job-related trainings were provided to employees in 2002?</p>	<ul style="list-style-type: none"> • Multiple responses are acceptable for each type of training per applicable position.
<p>8. Were the trainings provided intended...?</p>	<ul style="list-style-type: none"> • There should only be one response for each purpose of training. • If code 06 (Others) is checked, the purpose of training other than those enumerated should be specified.
<p>9. What were the sources of funds for the trainings?</p>	<ul style="list-style-type: none"> • Multiple responses are acceptable. • If code 09 (Others) is checked, the source of funds other than those enumerated should be specified.
<p>10. What measures have been implemented to cope with economic and financial difficulties?</p>	<ul style="list-style-type: none"> • There should only be one response for each measure implemented. • If code 13 (Others) is checked, the measure implemented other than those enumerated above should be specified.
<p>11. Has this establishment introduced any improvement scheme/s or innovation in 2002?</p>	<ul style="list-style-type: none"> • There should only be one response for each innovation introduced. • If code 08 (Others) is checked, the innovation introduced other than those enumerated should be specified.

ITEM OF INQUIRY	GUIDELINES
<p>12. For those with “No” replies in item 11, what factor/s impeded the adoption or implementation of any innovation?</p>	<ul style="list-style-type: none"> • There should be no marks here if there are only “Yes” responses in item 11. Otherwise, verify. • If there are “No” responses in item 11, there should only be one response for each impediment encountered. • If code 12 (Others) is checked, the impediment encountered other than those enumerated should be specified.

PART IV: Occupational Injuries

ITEM OF INQUIRY	GUIDELINES
<p>1. Did your establishment experience any occupational accidents during the year?</p> <p><i>Instruction Change:</i></p> <p><input type="checkbox"/> No, go to item 4.</p>	<ul style="list-style-type: none"> • There should only be one box checked, either ‘YES’ or ‘NO’. Otherwise, verify. • If neither boxes are checked, verify.
<p>2. How many occupational accidents were there?</p>	<ul style="list-style-type: none"> • Entry should be at least “1” if “Yes” is checked in item 1. • Entry may be equal to or less than the total cases of occupational injuries in item 3.1 since an accident may result to more than one case of occupational injury. Otherwise, verify.
<p>3. How many cases of occupational injuries and workdays were lost?</p>	<p><i>Note: This part of the questionnaire should be accomplished if there are occupational accidents reported in item 2.</i></p>
<p>3.1. Total (cases and lost workdays)</p>	<ul style="list-style-type: none"> • There should be reported cases for at least an incapacity from work (fatal, permanent or temporary) if “Yes is checked in item 1 and accidents are reported in item 2. Otherwise, verify. • Entries should be the sum of the corresponding details of any reported entries in items 3.1.1, 3.1.2, 3.1.3 and 3.1.4.
<p>3.1.1. Fatal (cases)</p>	<ul style="list-style-type: none"> • Accept with or without entry.
<p>3.1.2. Permanent incapacity (cases and lost workdays)</p>	<ul style="list-style-type: none"> • Accept with or without entries. • If cases are reported, there should be corresponding lost workdays or vice-versa. Otherwise, verify. • If there are lost workdays which include a half day ($\frac{1}{2}$ or decimal figure, e.g. 275 $\frac{1}{2}$ or 275.5, line out fraction or decimal, thus, entry becomes 275. • To check lost workdays per case: divide the number of lost workdays by the corresponding number of cases. Maximum number of lost workdays is 365 days per case. Otherwise, verify.
<p>3.1.3. Temporary incapacity (cases and lost workdays)</p>	<ul style="list-style-type: none"> • Accept with or without entries. • If cases are reported, there should be corresponding lost workdays or vice-versa. Otherwise, verify. • If there are lost workdays which include a half day ($\frac{1}{2}$ or decimal figure, e.g. 275 $\frac{1}{2}$ or 275.5, line out fraction or decimal, thus, entry becomes 275. • However, if entry is only one (1) case with a corresponding lost workday of only half-day ($\frac{1}{2}$ or 0.5), line out entries. Add one (1) case entry to that in item 3.1.4.

ITEM OF INQUIRY	GUIDELINES
<p>3.1.3. Temporary incapacity (cases and lost workdays) <i>(cont'd)</i></p>	<ul style="list-style-type: none"> To check lost workdays per case: divide the number of lost workdays by the corresponding number of cases. Maximum number of lost workdays is 365 days per case. Otherwise, verify
<p>3.1.4. Without lost workdays (cases)</p>	<ul style="list-style-type: none"> Accept with or without entry.
<p>4. How many hours were actually worked by all employed persons in your establishment during the year?</p>	<ul style="list-style-type: none"> There should be entry in this item regardless of occurrence or non-occurrence of an occupational accident in the establishment during the reference period. To check for acceptability of entry: divide entry by number of employed persons reported in Part I: item 3 for CY 2002. Accept entry that falls within the range of 1,200-3,600. Otherwise, verify. <i>Example: 661,620 hours actually worked of 270 employed during the reference year is approximately 2,450 hours per employed person.</i> In establishments engaged in provision of security and janitorial services, acceptable range of total hours actually worked during the year would be from 2,500 – 4,500 hours per employed person. Otherwise, verify.

PART V: Labor Cost of Employees

ITEM OF INQUIRY	GUIDELINES
<p>1. Reference period if other than calendar year (month/year)</p>	<ul style="list-style-type: none"> • If there is no entry, write 0102 for “Start” and 1202 for “End”. • If the reference period pertains to fiscal year, e.g. April 2002 to March 2003, the Reviewer should check that most of the months covered by the reference period falls within 2002. Otherwise, verify. After verification, the Reviewer should code “Start” with 0402 and “End” with 0303, e.g. MMY.
<p>2. Labor Cost Component</p>	<ul style="list-style-type: none"> • Data required pertains to employees reported in Part I item 4 for CY 2002. • Data should be for 12 months whether reference period is calendar or fiscal year unless establishment explicitly indicates that reference period is less than a year in item 1. • If amount given contains centavos, do not round off. Line out centavo entries. • If amount given is rounded off to thousands or millions, change to whole number, i.e., from 7.9M to 7,900,000.
<p>2.1 Direct wages and salaries (in cash)</p>	
<p>2.1.1. Pay for normal/regular working time</p>	<ul style="list-style-type: none"> • There should be entry in this item. Otherwise, verify. • If entry indicates consolidated data, e.g. including those for items 2.1.2 up to 2.1.4, verify. • To check for acceptability of entry: divide entry by number of employees reported in Part I item 4 for CY 2002. Accept entry that falls within the range of 24,000-350,000. Otherwise, verify. <p><i>Example: ₱16,211,856 payment for normal/regular working time for 265 employees during the reference year is approximately ₱61,177 per employee.</i></p>
<p>2.1.2. Commissions of employees and their share in service charges</p>	<ul style="list-style-type: none"> • Accept with or without entry. • Entry refers to those received by employees of the establishment (persons with basic pay and commission and those persons paid purely on commission basis but within employer control and supervision like drivers of bus line operations). On the other hand, these exclude commissions of those outside employer control and supervision. • If there is entry, it should be lower than that in item 2.1.1. Otherwise, verify. <p><i>Notes: Establishments engaged in insurance and real estate selling usually pay commissions to their employees on top of the basic pay. These commissions are earned by employees from sales/deals completed/ closed with clients. Sharing of service charges usually apply to employees in hotels and restaurants that collect service charges from their clients.</i></p>

ITEM OF INQUIRY	GUIDELINES
<p>2.1.3. Overtime, night shift and premium pay</p>	<ul style="list-style-type: none"> • Accept with or without entry. • If there is entry, it should be lower than that in item 2.1.1. Otherwise, verify. • Overtime pay refers to additional remuneration for work performed beyond eight (8) hours on regular working days, rest days, special days and regular holidays. • Night shift pay refers to payment for work performed between 10:00 p.m. to 6:00 a.m. of the next day. • Premium pay refers to remuneration for work performed within eight (8) hours on non-working days such as rest days, special days and regular holidays.
<p>2.1.4. Payments under bonus, productivity, performance and other incentive schemes</p> <p>2.1.5. Cost of living allowances and other guaranteed and regularly paid allowances</p>	<ul style="list-style-type: none"> • Accept with or without entry. • If there is entry, it should be lower than that in item 2.1.1. Otherwise, verify. • Entry refers to monthly or more frequently granted bonuses under contractual arrangements and relates to work performed or to current output e.g. productivity bonus for piece-rate workers whose outputs exceeded the daily quotas. • Entry should be distinguished/different from entry in item 2.3.1 which refers to less frequently granted or year-end/seasonal bonuses and gratuities. Otherwise, verify. • Accept with or without entry. • If there is entry, it should be lower than that in item 2.1.1. Otherwise, verify. • Examples of these are commutable representation and transportation allowances. • It should exclude housing allowances and rents in cash which should be reported in item 2.5.2.
<p>2.2. Remuneration for time not worked</p>	<ul style="list-style-type: none"> • Accept with or without entry. • If there is entry, it should be lower than that in item 2.1.1. Otherwise, verify. • Entry refers to payments of employers to employees when not at work, e.g. for paid leaves and in some cases for those leaves under collective bargaining agreements.
<p>2.3. Bonuses and gratuities</p>	
<p>2.3.1. Year-end, seasonal and other one-time bonuses</p>	<ul style="list-style-type: none"> • There should be entry in this item. Otherwise, verify. • If there is entry, it should be lower than that in item 2.1.1. Otherwise, verify. • Entry refers to mid-year bonus, Christmas bonus, 13th month pay (mandatory), 14th, 15th month pay and the like.

ITEM OF INQUIRY	GUIDELINES
<p>2.3.1. Year-end, seasonal and other one-time bonuses(cont'd)</p>	<ul style="list-style-type: none"> • Entry should be distinguished/different from entry in item 2.1.4 which refers to more frequently granted bonuses and gratuities. Otherwise, verify. • To check for acceptability of entry: divide entry by number of employees reported in Part I item 4 for CY 2002. Accept entry that falls within the range of 2,000-150,000. Otherwise, verify. <i>Example: ₱1,064,364 payment of one-time bonuses for 265 employees during the reference year is approximately ₱4,016 per employee. .</i> • Accept only after verification that no entry is due to non-payment of these types of bonuses even including the mandatory 13th month pay. • Accept only after verification that reported entry is outside the acceptable range since the only given bonus referred to as “13th month pay” is only less than the full-month basic pay equivalent per employee. • In a case wherein report in this item explicitly indicates that the entry covers only limited number of employees , e.g. 20, instead of all employees reported in Part I item 4 for CY 2002, denominator to be used in checking acceptability of entry should be the actual number of employees covered (in this example should be 20).
<p>2.3.2. Profit sharing bonuses</p>	<ul style="list-style-type: none"> • Accept with or without entry. • If there is entry, it should be lower than that in item 2.1.1. Otherwise, verify.
<p>2.3.3. Additional payments in respect of vacation, supplementary to normal vacation pay</p>	<ul style="list-style-type: none"> • Accept with or without entry. • If there is entry, it should be lower than that in item 2.1.1. Otherwise, verify. • Entry refers to payments made to employees over and above those given for paid vacation leaves.
<p>2.4. Payments in kind</p>	<ul style="list-style-type: none"> • Accept with or without entry. • If there is entry, it should be lower than that in item 2.1.1. Otherwise, verify. • Entry should be from the standpoint of the employer (employer’s cost). The value of all payments in kind should be at producer’s price as bought/provided by the employer and not the market price or retailer’s price as would have been bought/ consumed by the employees (benefit accruing to the employees). • Examples of these are cost for rice/corn, food subsidies, ordinary clothing or footwear (as distinguished from cost of uniform and safety shoes that should be included in item 2.9.1.

ITEM OF INQUIRY	GUIDELINES
2.4. Payments in kind (cont'd)	<ul style="list-style-type: none"> It should exclude the imputed rental value of free/subsidized housing, medical services and canteen and other welfare services and facilities
2.5. Cost of workers' housing shouldered by employer	
2.5.1. Cost for establishment-owned dwellings	<ul style="list-style-type: none"> Accept with or without entry. If there is entry, it should be lower than that in item 2.1.1. Otherwise, verify. Entry refers to the net cost to the employer of establishment-owned dwellings for the use of the employees in the form of maintenance expenditures, fees, property taxes, insurance, interest, depreciation, etc. but not capital investment on building, equipment or land and labor cost of housing personnel employed by the establishment. If entry is unusually high, i.e. runs to millions of pesos, verify as it might include the cost/worth of the building/housing facility.
2.5.2. Cost for dwellings not owned by establishment and other housing	<ul style="list-style-type: none"> Accept with or without entry. If there is entry, it should be lower than that in item 2.1.1. Otherwise, verify. Entry refers to the cost from the standpoint of the employer and not what it would have cost the employees if they were to spend for their own housing. Examples of these are housing allowances, rents, subsidies.
2.6. Employer's social security contributions	<ul style="list-style-type: none"> These exclude employees' shares.
2.6.1. Compulsory social security expenditures	<ul style="list-style-type: none"> There should be entry in this item. Otherwise, verify. If there is entry, it should be lower than that in item 2.1.1. Otherwise, verify. Examples of these are mandatory employers' contributions to SSS/GSIS, PhilHealth, Pag-IBIG and State Insurance Fund. . To check for acceptability of entry: divide entry by number of employees reported in Part I item 4 for CY 2002. Accept entry that falls within the range of 2,000–15,000. Otherwise, verify. <i>Example: ₱905,252 payment for compulsory social security expenditures of 265 employees during the reference year is approximately ₱3,416 per employee.</i> Accept only after verification that no entry is due to non-payment of these compulsory social security expenditures by the establishment.

ITEM OF INQUIRY	GUIDELINES
<p>2.6.1. Compulsory social security expenditures<i>(cont'd)</i></p>	<ul style="list-style-type: none"> • In a case wherein report in this item explicitly indicates that the entry covers only limited number of employees , e.g. 30, instead of all employees reported in Part I item 4 for CY 2002, denominator to be used in checking acceptability of entry should be the actual number of employees covered (in this example should be 30).
<p>2.6.2. Collectively agreed, contractual and non-obligatory contributions to private social security schemes and insurance</p>	<ul style="list-style-type: none"> • Accept with or without entry. • If there is entry, it should be lower than that in item 2.1.1. Otherwise, verify. • Examples of these are premiums paid for pension, life, accident, medical and health and hospitalization insurance/plans of employees at the initiative of the employer or under a CBA provision.
<p>2.6.3. Direct payments by employer to employees regarded as social security benefits</p>	<ul style="list-style-type: none"> • Accept with or without entry. • If there is entry, it should be lower than that in item 2.1.1. Otherwise, verify. • Entry refers to payments in respect of absence from work due to sickness, maternity or employment injury, etc. to compensate for loss of earnings given by employer directly to the employees. • As such, payments by GSIS/SSS are excluded.
<p>2.6.4. Cost of medical care and health services</p>	<ul style="list-style-type: none"> • Accept with or without entry. • If there is entry, it should be lower than that in item 2.1.1. Otherwise, verify. • Entry refers to actual medical care and health expenses by the employer on behalf of the employees, e.g. medicines, hospitalization, exclusive of medical and health insurance contributions that should be reported in item 2.6.2. • It should include the net cost to the employer of establishment-owned building and equipment used for the medical care and health services of the employees in the form of maintenance expenditures, fees, property taxes, insurance, interest, depreciation, etc. but not capital investment on building, equipment or land and labor cost of medical care and health service personnel employed by the establishment. • If the respondent is engaged in the provision of medical care or health services, i.e. hospitals, entry in this item does not refer to the maintenance, etc. of the hospital which is intended for its patients. • If entry is unusually high, i.e. millions of pesos particularly for establishments with PSIC N85 (hospital/clinic), verify as it might include cost/worth of the building/medical facility.

ITEM OF INQUIRY	GUIDELINES
<p>2.6.5. Retirement and termination/separation pay</p>	<ul style="list-style-type: none"> • Accept with or without entry. • If there is entry, it should be lower than that in item 2.1.1. Otherwise, verify.
<p>2.7. Cost of training</p>	<ul style="list-style-type: none"> • Accept with or without entry. • If there is entry, it should be lower than that in item 2.1.1. Otherwise, verify. • There should be an entry in this item if there are entries in Part III item 6 and there is a check in either codes 03 and 04 of Part III item 9. Otherwise, verify. • Entry refers to the cost to the employer in the training of its employees. • It should include the net cost to the employer of establishment-owned building and equipment used for employees' training in the form of maintenance expenditures, fees, property taxes, insurance, interest, depreciation, etc. but not capital investment on building, equipment or land and labor cost of training personnel employed by the establishment. It should also include payments made to outside instructors and other training institutions on behalf of the workers and reimbursement of school fees to workers. • If the respondent is engaged in the provision of education services, entry in this item does not include maintenance, etc. of the educational institution which is intended for its students. • If entry is unusually high i.e. runs to millions of pesos particularly for establishments with PSIC M81 (schools), verify as it might include cost/worth of the building/training facilities.
<p>2.8. Cost of welfare services</p>	<ul style="list-style-type: none"> • Accept with or without entry. • If there is entry, it should be lower than that in item 2.1.1. Otherwise, verify. • Entry refers to the cost incurred by the employer for the welfare or benefit of its employees other than for housing (included in item 2.5.1), medical care and health (included in item 2.6.4) and training (included in item 2.7). • It should include the net cost to the employer of establishment-owned building and equipment used for employees' welfare (such as canteen and food facilities, gymnasium/sport facilities) in the form of maintenance expenditures, fees, property taxes, insurance, interest, depreciation, etc. but not capital investment on building, equipment or land and labor cost of welfare service personnel employed by the establishment. It should also include grants by employers to credit unions and cost of related services for employees, etc.

ITEM OF INQUIRY	GUIDELINES
2.8. Cost of welfare services (cont'd)	<ul style="list-style-type: none"> • If the respondent is engaged in food or recreational business, cost to the employer does not include the maintenance, etc. of the restaurant, sports complex or beach resort which is intended for its customers. • If entry is unusually high i.e. runs to millions of pesos, verify as it might include cost/worth of the building/welfare facilities for its customers.
2.9. Other labor costs	
2.9.1. Cost of work clothes/protective gear	<ul style="list-style-type: none"> • Accept with or without entry. • If there is entry, it should be lower than that in item 2.1.1. Otherwise, verify. • Examples of these are uniform, work clothes, personal protective equipment such as safety shoes, eye goggles, etc. • This should be distinguished from the cost of ordinary clothing and footwear which should be included in item 2.4.
2.9.2. Transport of workers to and from work undertaken by employers	<ul style="list-style-type: none"> • Accept with or without entry. • If there is entry, it should be lower than that in item 2.1.1. Otherwise, verify. • Entry refers to the cost of transport of workers to and from work undertaken by the employer e.g. shuttle service.
2.9.3. Recruitment cost	<ul style="list-style-type: none"> • Accept with or without entry. • If there is entry, it should be lower than that in item 2.1.1. Otherwise, verify. • Entry refers to travel expenses for interviews of new employees, the cost of advertisements, fees paid to public and private employment services in connection with recruitment, the cost of documents, legal fees, medical or physical examinations for prospective employees (pre-employment) and similar expenses borne by the employer.
2.9.4. Others (specify)	<ul style="list-style-type: none"> • Accept with or without entry. • If there is entry, it should be lower than that in item 2.1.1. Otherwise, verify with the establishment. • If there is entry, description of other labor cost should be specified.
3. Hours actually worked by all employees	<ul style="list-style-type: none"> • There should be entry in this item. Otherwise, verify. • To check for acceptability of entry: divide entry by number of employees reported in Part I item 4 for CY 2002. Accept entry that falls within the range of 1,200-3,600. Otherwise, verify. <p><i>Example: 649,500 hours actually worked of 265 employees during the reference year is approximately 2,451 hours per employee.</i></p>

ITEM OF INQUIRY	GUIDELINES
3. Hours actually worked by all employees (cont'd)	<ul style="list-style-type: none"> • In establishments engaged in provision of security and janitorial services, acceptable range of total hours actually worked during the year would be from 2,500 – 4,500 hours per employee. Otherwise, verify.
4. Percent share of labor cost to total cost	<ul style="list-style-type: none"> • There should only be one box checked. • If 30% or more is checked, proportion should be specified.

PART VI: Certification

To facilitate coordination in cases when some entries have to be verified, the required information on the respondent should be fully provided. Respondent's signature in particular is important, as this means that the information provided by the establishment is authentic. If this portion is not accomplished, return the questionnaire to concerned personnel: Enumerator through Supervisor for NCR and Regional Supervisor through concerned Senior LEO for Regional Offices.

If there are no entries for the rest of the items in this section, the questionnaire can be endorsed for status monitoring and data entry.