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### SURFING THE SLID APPLICATION

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The SLID Research Paper Series is intended to document detailed studies and important decisions for the Survey of Labour and Income Dynamics. These research papers are available in English and French. To obtain a summary description of available documents or to obtain a copy of any, please contact Philip Giles, Manager, SLID Research Paper Series, by mail at 11-D8 Jean Talon Building, Statistics Canada, Ottawa, Ontario, CANADA K1A 0T6, by INTERNET (GILES@STATCAN.CA), by telephone (613) 951-2891, or by fax (613) 951-3253.

### **EXECUTIVE SUMMARY**

The Survey of Labour and Income Dynamics uses computer-assisted interviewing (CAI) for its data collection. The questions particular to each interview are preceded by the generic Case Management software used to identify households in the sample. They are followed by two sets of questions specific to SLID: the CONTACT and DEMOGRAPHIC modules.

This research paper represents a reference guide for these modules. It shows the actual screens seen on the computer, which help the user to fully understand the CONTACT and DEMOGRAPHIC modules.

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#### 1. INTRODUCTION

In January and February 1994, the first annual labour interview for the Survey of Labour and Income Dynamics (SLID) was conducted. In May 1994, the first SLID annual income data were collected. Both annual surveys use computer-assisted interviewing (CAI) for data collection. CAI is paperless interviewing. The questions particular to each interview are preceded by the generic Case Management software used to identify households in the sample, followed by two sets of questions specific to SLID: the CONTACT and the DEMOGRAPHIC modules.

This research paper presents a reference guide for the Case Management CONTACT and DEM (demographics) modules used in the 1995 interview. The document is based on practice cases developed for the SLID interviewer training program. It represents the actual screens seen on the computer and supplements the SLID QUESTIONNAIRE FOR DEMOGRAPHICS AND CONTACT (SLID research paper 95-04). It is designed to show the layout of the screens as well as to be used as a tutorial for someone learning the SLID software.

The CAI process is as follows:

a) A question appearing on the computer screen is read aloud to the respondent.

b) The respondent's answer is directly entered by the interviewer.c) Based on the answers given, and/or age or other flow criteria, the computer determines the next question to be asked and displays it on the screen.

#### 2. BACKGROUND INFORMATION

<u>Question numbers:</u> For each section, the question numbers refer to the actual numbers used in the software which appear on an interviewer's computer screen. Text in capital letters is read, as worded, by the interviewer. Those questions in lowercase with "interviewer" at the beginning are questions to be answered directly by the interviewer without asking the respondent.

<u>Pre-fill items:</u> These are items specific to each respondent's interview. The software adds the relevant information into the question, making it simply a matter of reading for the interviewer. The relevant pre-fill items for the practice case examples are shown on each screen. More generally the pre-fill items are:

[respondents] - this is the first and last name of the household member that the questions refer to. This is not necessarily the person who is talking to the interviewer.

[parent's name] - used to determine relationships, this is the parent's name in a parent-child relationship.

[child's name] - used to determine relationships, this is the child's name in a parent-child relationship.

[calculated age] - calculated from the reported date of birth, it is used to verify the date of birth information.

[current year] - data collection year

[reference year] - this is the year for which the information is collected.(the previous year)

[marital status] - the reported value, used in subsequent questions to identify dates of changes in marital status.

[previous address] - for persons reporting a move, this is the previous address of residence.

[current address] - the current address of residence.

Dates : All dates are entered numerically in boxes, using DD/MM/YY format.

<u>Function Keys</u>: Interviewers have a number of keys on the computer (function keys) which are available to provide them with the following options:

<u>F1 - Help:</u> a pop-up screen to give help tips.

<u>F2 - Language:</u> gives the interviewer an option to change the language of the questions.

<u>F3 - Options:</u> gives the interviewer access to some optional functions or information rosters. The choices available in the CONTACT and DEM modules are:

Household list - name, age, sex marital status of each household member;

Change name - required to change a respondent's name in the system;

Calculate year of birth - used to derive the year of birth based on the person's age

<u>F4 - Comment:</u> gives the interviewer the opportunity to add additional information in a note that will be attached to the data for that question. These comments are often useful during data processing.

F5 - Refusal: to indicate if the respondent refuses to answer the question.

<u>F6 - Don't Know:</u> to indicate if the respondent doesn't know the answer to the question.

<u>F7 - PrevQ</u>: shows a list of the previously answered questions.

<u>F8 - Qlist:</u> this provides a list of all questions answered so far, helpful when the interviewer needs to return to a previous question to make a correction.

<u>F9 - FastFwd :</u> Fast forwards to the last question answered.

<u>F10 - Exit:</u> allows the interviewer exit the interview questions at any time.

<u>Ranges</u>: Ranges of acceptable responses are specified for some of the questions. If the interviewer tries to enter a number outside the determined range, the system will not accept this.

#### 3. EXAMPLES

Contact and Demographic questions are asked at the household level. This document takes you through an interview where one household member has left and another has moved in. It then shows the component screen, which lists modules for each person in the January interview and in the household. All persons aged 16 and over are asked questions in the labour module, new members 15 and over are also asked background questions (BASE/PRELIMINARY Module). The general flow of the CONTACT and DEM modules are given in the Figures 1 and 2 in Appendix 1.

The information below outlines the example. Please read carefully before going any further.

At the previous interview, the following people lived in the household :

Manta KhanAge 61FemaleDate of Birth7 September, 1933Ravinder KhanAge 67MaleDate of birthUnknown

The following changes occurred in this household, since the last interview: Ravinder Khan moved intoThe Smithville Gardens nursing home on July 1, 1994. The address is 2500 Lee avenue, room 300, Smithville, Ontario, K7C 3G9.

Ramada Khan moved in August 31, 1994 to live with her grandmother. She moved from Montreal, Quebec in order to go to university. She turned 19 years old on Sept, 1st, 1994, so she was born in 1975. She has never been married.

Current Date		DACS LOGON Entry	DACS LOGON Entry					
Current Day		D A C S		LOGON				
	I	Rel. 2.03						
		Data Access Control Syste	em					
User ID ===>								
		Password ===>						
		Project ID ===>		(Optional)				
Data Access Control System (DACS) Copyright (C) PYRAMID Development Corp. 1986, 1995								
F1 = Help ; F10 = ACCEPT; $ALT_F10 = Accept / Change Passw$								

This is the first screen to appear after turning on the computer.

# To logon to the system:

Type in a USER ID and press ENTER.

Then type in a PASSWORD and press ENTER.

Then type in a PROJECTID if available, press ENTER (either way).

The LOGON is now complete.

Version 3.2

CASEMAIN

Case Management System \*\*\* Main Menu \*\*\* 1. Select Regular Assignment 2. Select Practice Cases

 $<^{\underline{J}}$  = Select

Once LOGGED onto the system, this menu will appear.

This menu was designed to choose the kind of case needed. Whether to select a regular (i.e. for actual survey collection) or practice case. (In this case, choose the practice case)

Selecting a case: move the highlighted bar by using the up or down arrows, then move the highlighted bar to **#2** - Select Practice Cases and press ENTER.

## PRACTICE

CASEMAIN1		
	Case Management System *** Options Menu ***	DATE: (current date) TIME: (current time)
	1. Select a Survey	
	<ol> <li>View Workload Report</li> <li>Set Date and Time</li> </ol>	

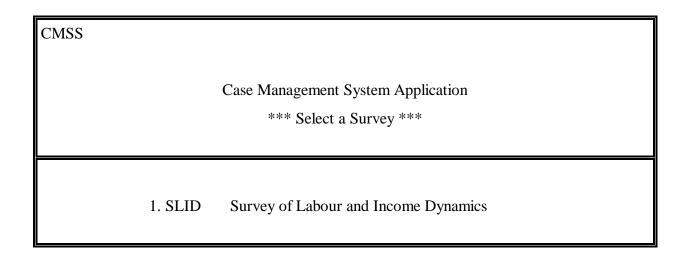
 $<^{\underline{J}}$  = Select

We are now in the Practice area.

To activate the highlighted bar, press the downward arrow key.

Choose **#1 - Select a Survey** and press ENTER

PRACTICE



F2 = Reset

 $< \underline{\mathbb{I}} = Select$ 

This menu is designed to help choose a Specific Survey for practice purposes.

The F2 key will reset the practice cases. (In order to reuse the cases over again).

To activate the highlighted bar, please move the arrow key downward.

Move the highlighted bar to **#1 SLID - Survey of Labour and Income Dynamics** and press ENTER.

CMV1 Please insert a daily backup diskette. Press Any key to continue

## Esc = Cancel

At this point you must insert a diskette into the laptop, in order to create a backup version of the cases. This diskette is valid for only one day of use. In order to reuse the same diskette you must wait a minimum of 3 days. This is a security measure incorporated into the system.

CMSLID1	Case Management - SLID	PRACTICE
Folder : Telephone	View and Select Cases	

- 10 -

Sample ID Rte	Stat	tat P Best Time to Call		Appointment
ZSLDZZ1Z		0	ANYTIME	/ /
ZSLDZZ25		0	WEEKDAYS, BEFORE 16:00H	/ /
ZSLDZZ28	077	0	ANYTIME	/ /
ZSLDZZ29		0	ANYTIME AFTER 1800H	/ /
ZSLDZZ2B	080	0	EN TOUT TEMPS	/ /
ZSLDZZ2E		0	En Tout Temps Dans L'avant Midi	/ /
ZSLDZZ2H		0	AVANT 1600H LA SEMAINE	/ /
ZSLDZZ2J		0	EN TOUT TEMPS	/ /

Perm Note:

Temp Note:

Last Cont. :	MANTA	A KHAN			Calls/Stat
Mail Addr:	787 ME	LBOURNE S'	TREET	Appt: / /	/ /
	SMITH	VILLE			
				Lang: / /	
Last Resp. :	000				
	House	Persons			
% Complete:	:		(0/2)		

F1 = Help F2 = Folders F3 = Demographics F5 = Route F6 = Transfer F7 = Sort F8=Calls F9=Mode F11=Notes/Appt. ALTF2=Language ESC=Cancel

The table above is designed to let the user choose a Household on which to practice.

The user should experiment with the following options before going any further:

• View general data for each household: move the highlighted bar to a specific household and the information will be noted in the bottom half of the screen.

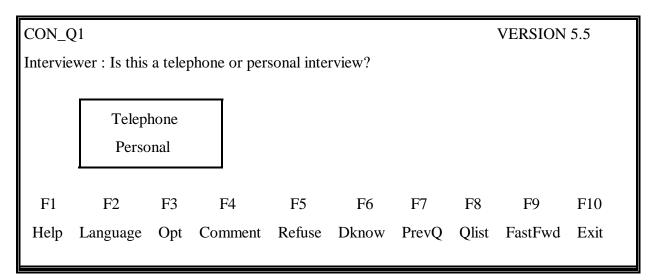
• View the composition of a household: move the highlighted bar to the household in question and press the F3 = Demographics key and the name, age, sex and etc. will be noted in a pop up window.

• To choose or change the language used: press the ALT key + the F2 key together and a pop up window will appear with the choice of English or French, move the highlighted bar to the language desired and press ENTER.

• To choose a specific household, move the highlighted bar to the household in question and press ENTER. We will now choose a household.

• To activate the highlighted bar, use the downward arrow key.

To continue with this practice case, move the highlighted bar to ZSLDZZ25 and press ENTER.



To activate the highlighted bar, please move the arrow key downward.

Then choose the kind of interview being used.

As an example, choose telephone and press ENTER.

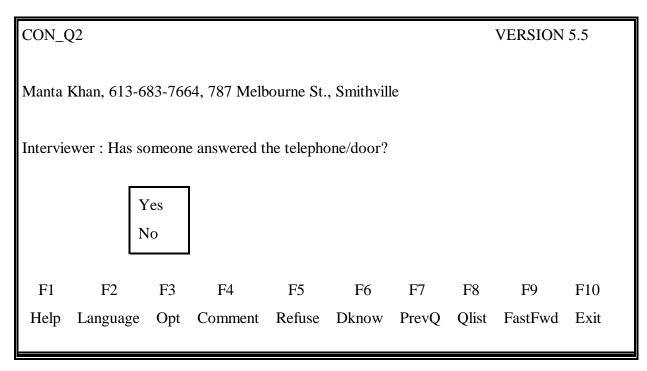
Explanation of the FUNCTION KEYS:

F1 =Help (Help pop-up screen)

F2 = Language (Change the interview question from english to french)
F3 =Options (These are options, they are different for each module)
F4 =Comment (Inserts a pop up screen to insert notes, comments)
F5 =Refuse (Use this key when a person refuses to answer a question)
F6 =Dknow (Use this key when a person doesn't know the answer)
F7 =PrevQ (Returns you to the previous screen)
F8 =Qlist (Gives a list of previously answered questions to refer back)
F9 =FastFwd (Fast forward to the last question asked)
F10 = Exit (Lets you quit at anytime during the interview)

Examples of these function keys will be found throughout this guide.

At this time, no HELP (F1) text has been added to the application. Over time, information will be added.



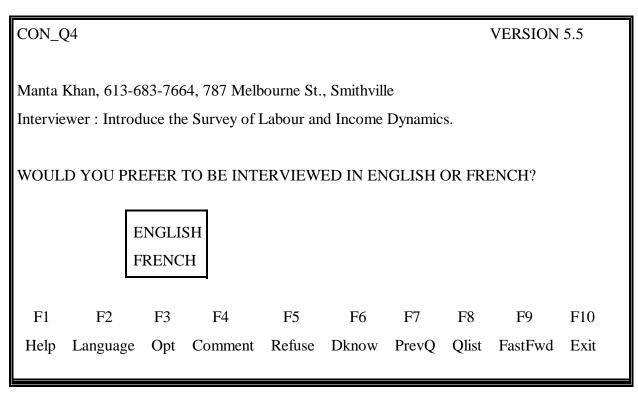
Then choose the appropriate answer.

As an example, choose Yes and press ENTER.

NOTE : Names and addresses are slightly different for French practice cases.

CON_Q3	VERSION 5.5								
Manta Khan, 613-683-7664, 787 Melbourne St., Smithville									
HELLO THIS IS (your name) FROM STATISTICS CANADA.									
IS THIS THE HOUSEHOLD OF?									
Interviewer read the names and if at least one									
person lives there, enter <yes>.</yes>									
Yes MANTA KHAN 61 FEMALE No RAVINDER KHAN 67 MALE									
F1 F2 F3 F4 F5 F6	F7	F8	F9	F10					
Help Language Opt Comment Refuse Dknow	PrevQ	Qlist	FastFwd	Exit					

Then choose the Yes answer and press ENTER.



Then choose the language for the interview.

As an example choose English.

If you had chosen the French language, the questions would have automatically changed to the French text.

CON_Q	CON_Q5 V								5.5	
ALL YOUR INFORMATION WILL BE KEPT STRICTLY CONFIDENTIAL. FIRST, I'D LIKE TO CONFIRM YOUR ADDRESS.										
IS IT ST	TILL?	787 ME	LBOURNE	STREET						
		SMITH	VILLE							
	ONTARIO									
		K1B7C	5							
	Yes = Address confirmed No = Correct part of the address No = Correct all of the address									
F1	F2	F3	F4	F5	F6	F7	F8	F9	F10	
Help	Language	e Opt	Comment	Refuse	Dknow	PrevQ	Qlist	FastFwd	Exit	

Then choose the appropriate answer.

As an example choose Yes.

CON_(	CON_Q6 VERSION 5.5									
Interviewer : Ask or confirm telephone number.										
613-68	613-683-7664									
F1	F2	F3	F4	F5	F6	F7	F8	F9	F10	
Help	Language	Opt	Comment	Refuse	Dknow	PrevQ	Qlist	FastFwd	Exit	

Press ENTER once for each part of the telephone number that is correct.

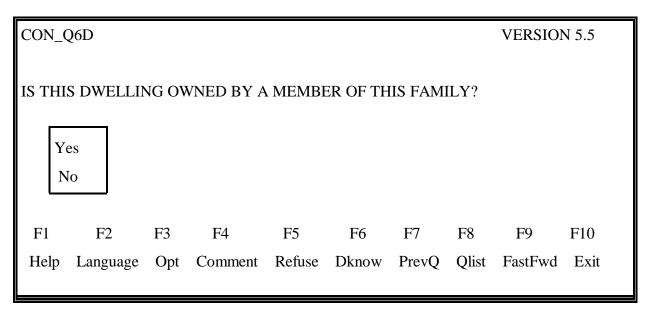
As an example say the area code is incorrect.

Then type in the right area code (i.e., 416) and then press ENTER, once for the area code, once for the 3 digit local number and once again for the 4 digit number. You will now advance to the next screen.

CON_Q6C VERSION 5									N 5.5
DO YO	DO YOU LIVE IN A								
SING	LE DETAC	HED F	IOUSE						
SEMI	SEMI-DETACHED, TOWNHOUSE(row, garden house), or DUPLEX (one above the other)								
APAF	RTMENT								
OTH	ER								
F1	F2	F3	F4	F5	F6	F7	F8	F9	F10
Help	Language	Opt	Comment	Refuse	Dknow	PrevQ	Qlist	FastFwd	Exit

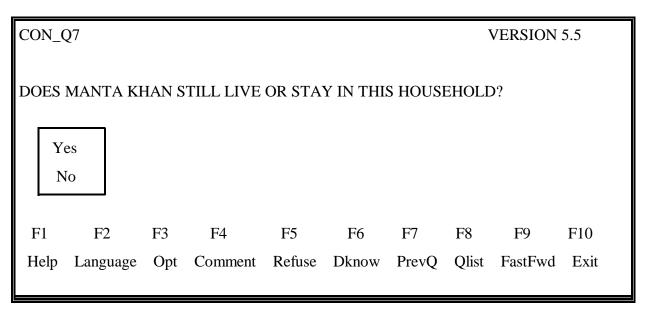
Then choose the appropriate answer.

As an example choose APARTMENT.



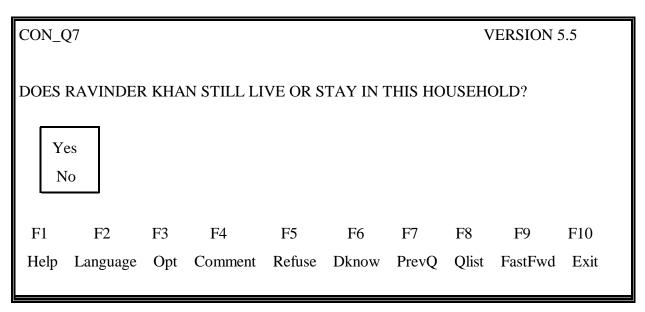
Then choose the appropriate answer.

As an example, choose YES and press ENTER.



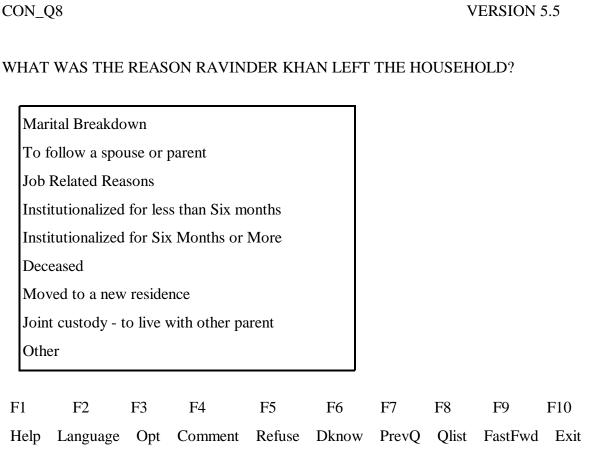
Then choose the appropriate answer.

As an example, choose YES and press ENTER.



Then choose the appropriate answer.

As an example, choose NO and press ENTER.



Then choose the appropriate answer.

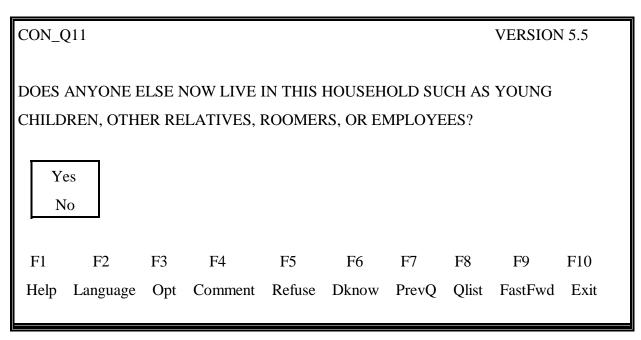
Choose the answer "institutionalized for 6 months or more" and press ENTER.

CON_Q9A								VERSION	N 5.5
WHEN DID RAVINDER KHAN ENTER THE INSTITUTION?									
Earliest date: 01/01/94 Latest date: Current date									
Day	Month	Y	ear						
F1	F2	F3	F4	F5	F6	F7	F8	F9	F10
Help	Language	Opt	Comment	Refuse	Dknow	PrevQ	Qlist	FastFwd	Exit

Type in the 01/07/94 as the date of entry into the institution and press ENTER.

CON_0	29C			VERSION 5.5				N 5.5	
WHAT IS THE NAME OF THE INSTITUTION?									
F1	F2	F3	F4	F5	F6	F7	F8	F9	F10
Help	Language	Opt	Comment	Refuse	Dknow	PrevQ	Qlist	FastFwd	Exit

Then type in "Smithville Gardens" and press ENTER.



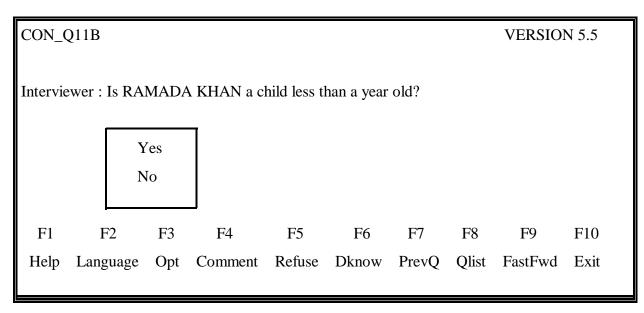
Then choose the appropriate answer.

As an example, choose YES and press ENTER.

CON_Q11A							VERSION 5.5			
DOES ANYBODY ELSE LIVE OR STAY IN THIS HOUSEHOLD?										
Interviewer : Press <enter> after first and last names. Press <f12> when all members entered.</f12></enter>										
_	First Name	_	Last Name							
F1	F2	F4		F7	F8	F9	F10			
Help	Language	Comment		PrevQ	Qlist	FastFwd	Exit			

Then type in the name of the new member.

As an example type RAMADA KHAN and press F12.



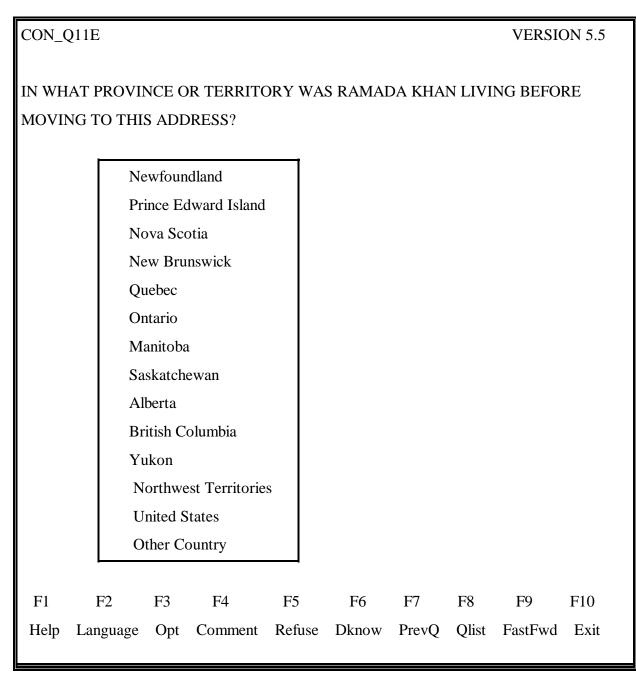
Then choose the appropriate answer.

As an example choose NO.

CON_Q11D								VERSION 5.5		
WHEN DID RAMADA KHAN MOVE IN?										
Earliest date: 01/01/94 Latest date: 31/05/95										
D	ay Month	L	Year							
F1	F2	F3	F4	F5	F6	F7	F8	F9	F10	
Help	Language	Opt	Comment	Refuse	Dknow	PrevQ	Qlist	FastFwd	Exit	

Then type in the date of arrival of the new member.

As an example type in 31/08/94 and press ENTER.



Then choose the appropriate answer.

As an example choose QUEBEC and press ENTER.

END_CON								VERSI	ON 5.5
Interviewer : Contact completed. Review household composition. Press <f8> to correct. Press <f12> to continue.</f12></f8>									
	MANTA RAVINDER RAMADA		KHAN I		Member Institutionalized >6 Joiner		months	5	
F1 Help	F2 Language	F3 Opt	F4 Comment	F5 Refuse	F6 Dknow	F7 PrevQ	F8 Qlist	F9 FastFwo	F10 d Exit

Press the  $\langle F12 \rangle$  key to accept the composition of the household.

Once you have pressed the  $\langle F12 \rangle$  key, changes can no longer be made to the membership of this household.

To practice, you may press <F8> and see how changes can be made.

RO	ROSTER VERSION 5								
			elect a person and $<$ you can <	-					
to e	entry	to make a corre 2 to continue.	-	140/					
110		Members							
	√	Name		Birth date	Sex	M. Status	Rel.		
		MANTA RAMADA	KHAN KHAN	/ /	Female	Married			
F He		F2 Language	F4 Comment					F10 Exit	

Information that has already been collected is prefilled in the ROSTER. (The sex and marital status of Manta Khan were previously obtained).

To activate the highlighted bar, please move the downward arrow key.

Then choose a member and press ENTER.

As an example choose RAMADA KHAN and press ENTER.

DEM_Q1	VERSION 5.5			
WHAT IS RAMADA KHAN'S DATE OF BIRTH?	Select Option to View:			
	Household List			
	Change Name			
	Calculate Year of Birth			
	ESC = QUIT ENTER:Select			
Day Month Year				
F1 F2 F3 F4 F5 F	F6 F7 F8 F9 F10			
Help Language Opt Comment Refuse Dkr	now PrevQ Qlist FastFwd Exit			

Use the F3 function key to calculate the year of birth for Ramada Khan.

The pop-up window "Select Option to View:" appears.

Activate the highlighted bar and choose Calculate Year of Birth and press ENTER.

DEM_Q1	VERSION 5.5
WHAT IS RAMADA KHAN'S DATE OF BIRTH?	Select Option to View:
	Household List
	Change Name
	Calculate Year of Birth
	ESC = QUIT ENTER:Select
Day Month Year Please	enter the age
The ye	ear of birth is 1975
F1 F2 F3 F4 F5 F Help Language Opt Comment Refuse Dkr	F6 F7 F8 F9 F10 Now PrevQ Qlist FastFwd Exit

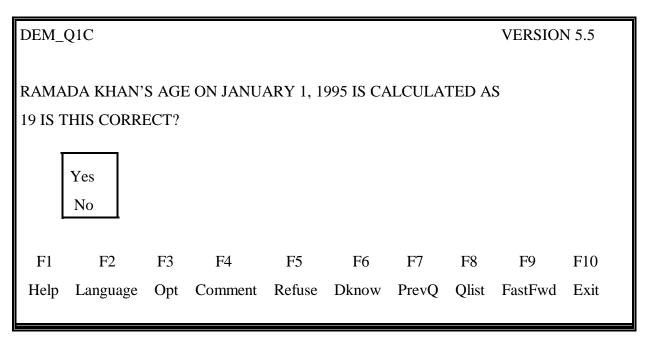
Then type in the age of Ramada Khan, which is 19 years old.

Then the year of birth 1975, appears automatically.

Press ENTER to return to the Select Options to View screen.

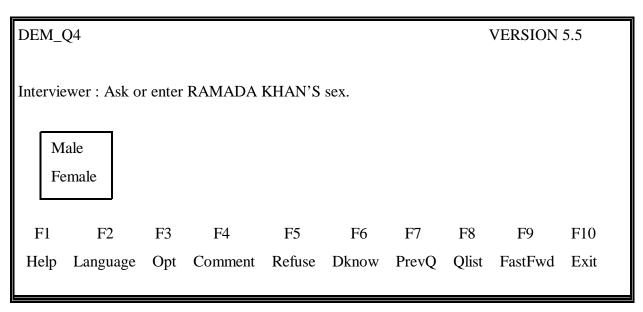
Press ESC to return to the original date of birth screen.

Now enter the date of birth as 01/09/75.



Then type in the appropriate answer.

As an example choose YES and press ENTER.



Then choose the appropriate sex.

As an example choose Female and press ENTER.

DEM_	Q5							VERSION	5.5
WHAT	IS RAMAD	OA KH	AN'S MAR	ITAL ST	ATUS? IS	IT			
	MARRIED	)							
	COMMON-LAW								
	SEPARATED								
	DIVORCED								
	WIDOWE	D							
	SINGLE (1	NEVE	R MARRIEI	<b>D</b> )					
F1	F2	F3	F4	F5	F6	F7	F8	F9	F10
Help	Language	Opt	Comment	Refuse	Dknow	PrevQ	Qlist	FastFwd	Exit

Then choose the appropriate answer.

As an example choose single (never married) and press ENTER

We will now go through the same steps for MANTA KHAN.

DEM_Q1				VERSION	5.5		
WHAT IS MANTA KHAN'S DATE OF BIRTH?							
The age in years is 61							
Use the F3 key to help ca	lculate the ye	ar of birth	1.				
Day Month	Year						
F1 F2 F3	F4	F5	F6	F7	F8	F9	F10
Help Language Opt	Comment	Refuse	Dknow	PrevQ	Qlist	FastFwd	Exit

Type in 07/09/33 and press ENTER.

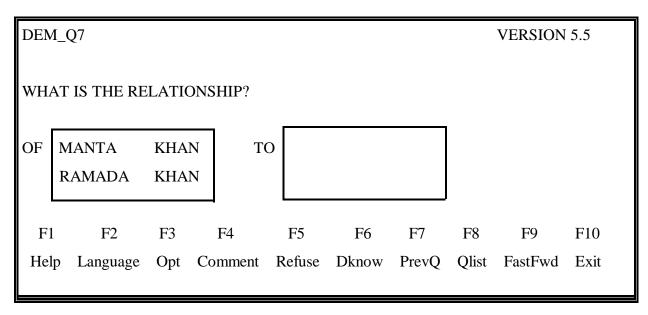
DEM_	Q5A						VERSION	N 5.5	
			A KHAN'S	MARITA	L STATU	JS AS M	ARRIE	D.	
F1 Help	F2 Language		F4 Comment						F10 Exit
Comment :									

Since Ravinder Khan has been institutionalized they could be considered as separated. We will insert this note into the comment function.

Press the F4 Comment function key and a pop-up line will appear at the bottom of the screen. Once the information about the separation due to medical circumstances is entered press ENTER.

Then choose the Yes and press ENTER.

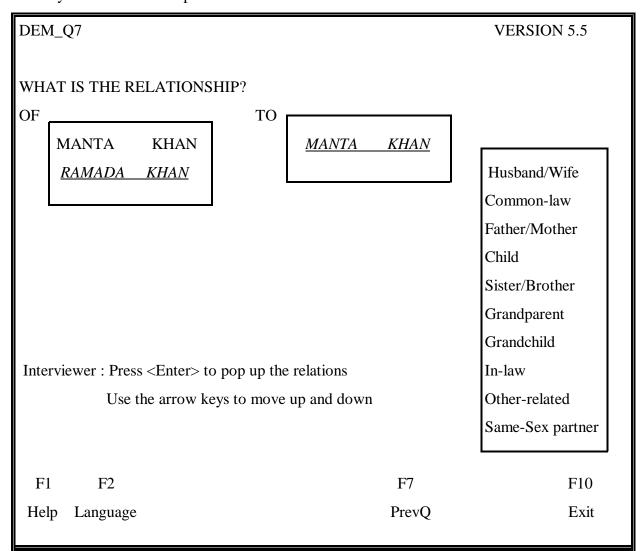
The computer returns to the ROSTER screen until all missing information is complete, this is shown by a checkmark by each person's name. Once all the information is entered for all the members of the household and is correct, press  $\langle F12 \rangle$  to continue.



Then choose a member and press ENTER.

As an example Choose RAMADA KHAN and press ENTER.

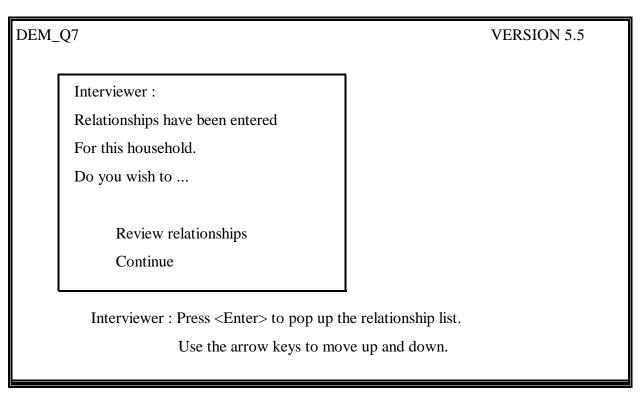
Then the TO BOX is highlighted and the names of MANTA and RAMADA appear and they ask the relationship for each member.



To activate the highlighted bar, please move the downward arrow key.

This will let you choose the appropriate relationship for each person. In this example, enter grandchild since Manta is Ramada's grandmother.

The computer will prompt the user for each member in the household. Once all relationships have been entered, the following screen appears.



Press the <F12> key to review the relationships.

DE	M_Q8	V	ERSION 5.5					
	Interviewer : Review household relationships.							
		ter> to correct.						
	Press <f1< td=""><td>2&gt; to continue.</td><td></td><td></td><td></td></f1<>	2> to continue.						
	First Name	Last Name	Is the of	First Name	Last Name			
	MANTA RAMADA	KHAN KHAN	Grandparent Grandchild	RAMADA MANTA	KHAN KHAN			
F	F1 F2			F7	F10			
H	elp Language		Р	revQ	Exit			

If all information is correct press <F12>.

Once you have pressed <F12> key no changes can be made to the demographic questions.

## COMPONENT LIST

Name		Age	Component	DoneSt.
MANTA	KHAN	61	LABOUR/TRAVAIL	
RAMADA	KHAN	19	BASE/BASE LABOUR/TRAVAIL	
Exit				

 $<^{\underline{J}}$  = Select

CONTACT NAME:	MANTA KHAN
ADDRESS :	787 MELBOURNE STREET
TEL.:	416-683-7664

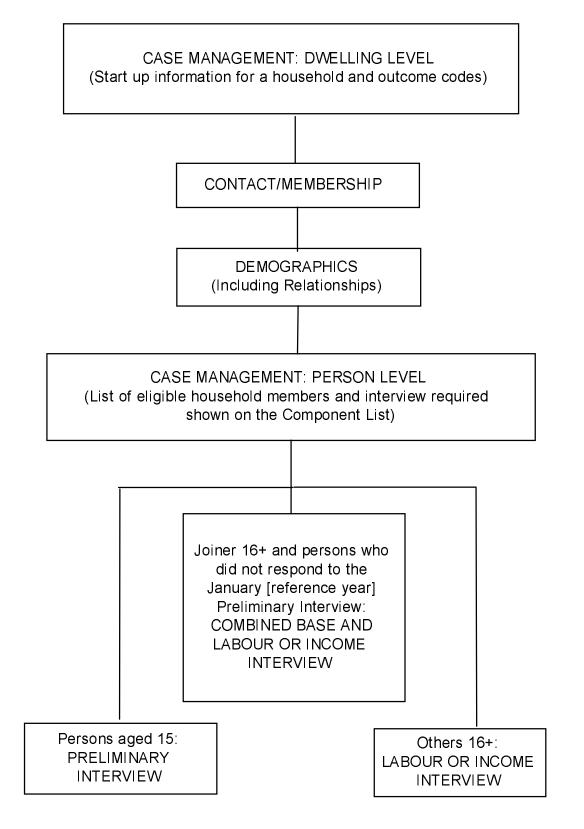
By selecting RAMADA KHAN's name, the Base and Labour interview questions would appear. The flow of these questions are straightforward. The computer will take you through the interview. The same process would happen if you were to choose MANTA KHAN, except that only the Labour interview questions would appear. In May, after the Contact and Demographic modules are completed, only the Income Interview is shown.

APPENDIX 1

FLOWCHARTS



## FIGURE 1 : FLOW OF THE SLID INTERVIEW



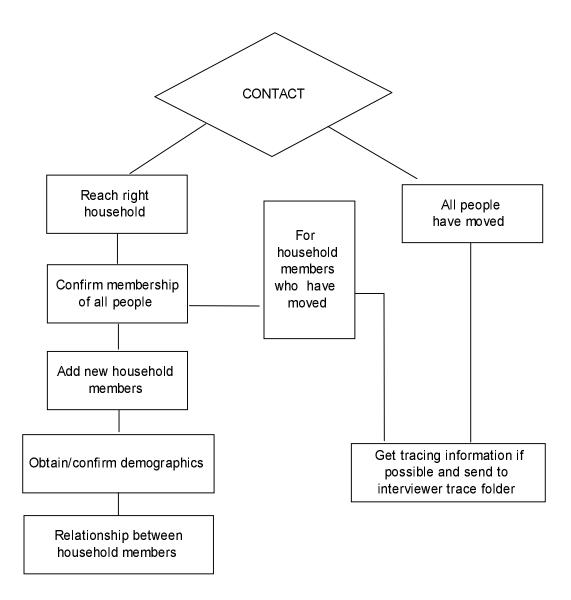


FIGURE 2: FLOW OF THE CONTACT/DEM MODULES

