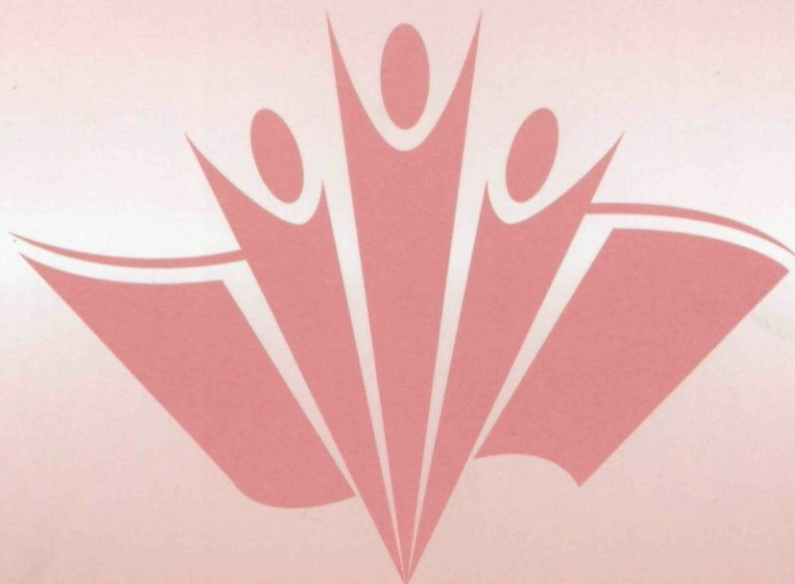


ACGS-2

92N0096XPE  
c.3

**User Guide**  
**for Expert Coding of**  
**Sociocultural Variables**



**Automated Coding**



Statistics  
Canada

Statistique  
Canada

Canada



Automated Coding

**User Guide**

**for Expert Coding**

**of Sociocultural Variables**



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## I. Introduction

### Who Should Read the User Guide

The User Guide of the Automated Coding System is designed for Expert coders, also referred as Tier 2 coders. Expert coders will be resolving the most difficult cases.

They will perform computer-assisted coding and they must master the ACTR parsing and coding procedures for one or more variables.

### Organization of the User Guide

The User Guide is meant to be read sequentially. The most general information and basic steps are explained first and lead to more specific coding activities.

The User Guide covers the following topics:

- Looking at the screens
- Using the keyboard and each PF key
- Overview of Quality Control Methodology
- Expert Coding activities
- Expert Quality Control of System Coding
- Expert Quality Control of Interactive Coding
- Referral Coding
- Coding of write-ins deferred to later
- Recoding of rejects



## II. Examples Used

Examples illustrate the coding steps using responses for the Ethnic Origin variable, but the instructions to be followed apply to all variables.

For these examples, both the codes and the coding results for a specific response are used for **illustration purposes only**. The codes provided in this guide may not be the most up-to-date and should not be used for processing the Ethnic Origin variable. During production, each response must be coded from the most recent list of codes to maintain an acceptable quality of coding.

What Variable to Code  
and What Coding Activity  
to Perform?

An Expert coder **must** select the coding activity and the variable to code. The system presents the coder with a series of menus to select a coding activity and variable. Write-in responses to be coded will be presented to the coder based on these selections and what he/she is authorized to do.

### Menu screen of Expert Coding activities

```

PTIER2          1996 CENSUS OF POPULATION / AUTOMATED CODING          02/09/96
MCODING1              CODING ACTIVITIES                               10:12:32.1

1. Status of Variables
2. General Coding
3. Expert Quality Control of System Coding
4. Expert Quality Control of Interactive Coding
5. Referral Coding
6. Recoding of Rejects
7. Coding of Write-ins Deferred to Later

          Enter selection : _

-Enter---PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12--
                                          QUIT

```

Enter Selection "1"  
for Status of Variables

The Coder could request the status of variables in order to interrogate the system if there is work outstanding for the different coding activities he/she is authorized to perform.

Menu screen of variables after "1" is selected for "Status of Variables"

```
NSTATUS          1996 CENSUS OF POPULATION / AUTOMATED CODING          02/09/96
MSTATUS1         STATUS OF VARIABLES                                   11:01:12.1

1. Non-official Language  6. Indian Band/First Nation 11. Mobility 5 yrs out Can.
2. Home Language         7. Citizenship                12. Mobility 5 yrs in Can.
3. Mother Tongue 2A      8. Place of Birth            13. Major Field of Study
4. Mother Tongue 2B      9. Mobility 1 yr out Can     14. Population Group
5. Ethnic Origin         10. Mobility 1 yr in Can

                Enter selection : __

Variable selected : _____

                                Outstanding? (Y/N)
Expert Quality Control of System Coding : -
Expert Quality Control of Interactive Coding : -
                                Referral Coding : -
                                Recoding of Rejects : -
Coding of Write-ins Deferred to Later : -

-Enter---PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10---PF11---PF12-
                                PREV                                QUIT

I006 ENTER SELECTION FOR A VARIABLE
```

Enter Selection 1 to 14  
for a Variable

The system reports with an indicator of Y(es) or N(o) if there are write-in responses to be coded for the variable selected and if you are authorized to code them. Press PF7 to return to the previous menu, and select a variable and coding activity you now know there is work for.

Menu screen of variables after "5" is selected for status of Ethnic Origin

```

NSTATUS          1996 CENSUS OF POPULATION / AUTOMATED CODING          02/09/96
MSTATUS1         STATUS OF VARIABLES                                   11:01:12.1

1. Non-official Language  6. Indian Band/First Nation 11. Mobility 5 yrs out Can.
2. Home Language         7. Citizenship          12. Mobility 5 yrs in Can.
3. Mother Tongue 2A      8. Place of Birth       13. Major Field of Study
4. Mother Tongue 2B      9. Mobility 1 yr out Can 14. Population Group
5. Ethnic Origin         10. Mobility 1 yr in Can

                Enter selection : 5

Variable selected : ETHNIC ORIGIN

                Outstanding? (Y/N)
Expert Quality Control of System Coding : Y
Expert Quality Control of Interactive Coding : N
                Referral Coding : Y
                Recoding of Rejects : N
Coding of Write-ins Deferred to Later : N

-Enter---PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12-
                PREV                                QUIT

```

Enter Selection "2"  
for General Coding

**General Coding** refers to the coding activities normally performed by General coders (Tier 1). This coding activity should be selected by an Expert coder only when there is no work available and no indication that some will be available shortly at the Tier 2 level.

During General Coding, the Coder is assigned either a work unit of write-in responses to be coded because the system was not able to code them or a sample of write-in responses to be coded for first or second Quality Control coding.

When an Expert coder (Tier 2) selects General Coding, he/she will access the same **coding material and computer-assisted features as a General coder**. The Coder must follow explicitly the instructions of the User Guide for General Coding of Sociocultural variables.

*When an Expert coder selects General Coding but does not complete the coding of a work unit, the system will request that coding of the outstanding work unit be completed first before the Coder is able to select any other coding activity.*

Enter Selection "3"  
for Expert Quality Control  
of System Coding

**Expert Quality Control of System Coding** is a coding activity which an Expert coder may select to adjudicate sampled write-in responses which are Majority referrals or Three-way discrepancies as a result of the second Quality Control coding of write-in responses coded by the batch jobstream.

The code assigned by the Expert Coder is compared to the System codes, QC1 code and QC2 code. Each code which does not agree with the final code assigned by the Expert Coder is attributed an error. No error is charged for a referral request.

The sample for Quality Control is selected based on occurrence for each unique code and write-in combination coded by the system.

Enter Selection "4"  
for Expert Quality Control  
of Interactive Coding

**Expert Quality Control of Interactive Coding** is a coding activity which an Expert coder may select to adjudicate sampled write-in responses which are Majority referrals or Three-way discrepancies as a result of the second Quality Control coding of write-in responses coded by General coders.

The code assigned by the Expert coder is compared to the Manual codes, QC1 code and QC2 code. The Manual code refers to the initial code assigned to a write-in response by a General coder using the interactive coding system. Each code which does not agree with the final code assigned by the Expert coder is attributed an error. No error is charged for a referral request.

The sample for Quality Control is randomly selected from each work unit coded by General coders. When a sample from a work unit has too many errors, the work unit is rejected and will be recoded.

Enter Selection "5"  
for Referral Coding

**Referral Coding** is a coding activity which an Expert coder may select to resolve write-in responses which the General coders (Tier 1) were not able to code and have referred to the Expert coders (Tier 2) for resolution.

Enter Selection "6"  
for Recoding of Rejects

**Recoding of Rejects** is a coding activity which an Expert coder may select to review and recode the write-in responses from rejected work units coded by the General coders. The write-in responses of a rejected work unit to be reviewed are those which were not part of the sample and which were not sent to Referral Coding.

Enter Selection "7"  
for Coding of Write-ins  
Deferred to Later

**Coding of Write-ins Deferred to Later** is a coding activity which an Expert coder may select to resolve the write-in responses which were deferred to later during a previous coding session.

General instructions which apply to all coding activities follow. For step-by-step instructions, refer to the appropriate section of this manual or to the User Guide for General Coding, depending on the coding activity selected.

- ⇒ refer to the User Guide for General Coding for the coding activity 2
- ⇒ see page 5 for the coding activities 3, 4, 5 or 7
- ⇒ see page 6 for the coding activity 6

**After the Coder has selected a coding activity, he/she must select a variable and access mode.**

Enter Selection 1 to 14 for  
a Variable

When a coder selects any of the coding activities from 3 to 7, he/she must select a variable to be coded and an access mode.

Enter "1" for Sequential  
Access

The system returns write-in responses sequentially based on the coding activity and variable selected by the Coder, and on what he/she is authorized to code. Sequential access is the most frequent selection used by Expert coders.

Enter "2" and a Person  
Identifier to Access a  
Person

The system returns a single write-in response based on the person identifier, coding activity and variable selected by the Coder. This access mode is useful when you wish to resolve a very specific write-in response.

Menu screen to select a variable and an access mode for a coding activity

```

SVERCOD          1996 CENSUS OF POPULATION / AUTOMATED CODING          02/09/96
MACCESS1                VARIABLE ACCESS MODE SELECTION                11:45:01.3

1. Non-official Language  6. Indian Band/First Nation  11. Mobility 5 yrs out Can.
2. Home Language          7. Citizenship                    12. Mobility 5 yrs in Can.
3. Mother Tongue 2A       8. Place of Birth                 13. Major Field of Study
4. Mother Tongue 2B       9. Mobility 1 yr out Can          14. Population Group
5. Ethnic Origin          10. Mobility 1 yr in Can

                                Enter selection : 5

Variable selected : ETHNIC ORIGIN

Select access mode : _

    1. Sequential
    2. By person

                                PEDEA : _____
                                HHNUM : _____
                                PERSNR : _____

Enter---PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12-
                                PREV                                QUIT

I006 ENTER SELECTION FOR A VARIABLE
    
```

These conditions could be reported once a coding activity, variable and access mode are selected.

When Coder Is Not Authorized

When the Coder is not authorized for the variable(s) and coding activity(ies) selected, a message is displayed. The Coder must enter new selections for Coding Activity, Variable and Access Mode.

W127 CODER IS NOT AUTHORIZED FOR THE SELECTION REQUESTED.

No Work Available

When the system has no work available for the variable(s) and coding activity(ies) which a coder selected, a message is displayed.

I112 NO WORK TO BE PERFORMED FRO THE SELECTIONS REQUESTED

The system automatically returns to the menu for a new selection of an access mode and variable for the same coding activity. If you wish to work on a different coding activity, press PF7 to return to the previous menu for the selection of a new coding activity. The Coder must enter new selections for Coding Activity, Variable and Access Mode



When there is work available for a coder, the system displays one of two (2) screens depending on the coding activity selected. Examples of each follow.

Expert Coding screen for an Ethnic Origin write-in response after coding activities 3, 4, 5 or 7 are selected

```

EXPERETO          1996 CENSUS OF POPULATION / AUTOMATED CODING          02/09/96
MEXPERT1          EXPERT CODING - ETHNIC ORIGIN                          12:16:42.1
Write-in to be coded                                         Type Code
GEORGIAN
Phrases returned by ACTR                                     Score Codes (S)elect
GEORGIAN USSR                                             1.782 050
Lower: 0.000 Upper: 0.000 Diff: 0.00 Returns: 0
ID: 31969699 069 0002 16
=====
Data for same question from each household member           Persnr: 2
Check- :
boxes:
Write-ins: GEORGIAN
:
:
Enter---PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10---PF11---PF12
HELP UP DOWN <<<< >>>> MORE +UP +DOWN DEFER VALID COMIT QUIT
    
```

Locate items on an Expert Coding screen (without data)

```

EXPERETO          1996 CENSUS OF POPULATION / AUTOMATED CODING          DD/MM/YY
MEXPERT1          EXPERT CODING - ETHNIC ORIGIN                          HH:MM:SS.S
Write-in to be coded                                         Type Code
Phrases returned by ACTR                                     Score Codes (S)elect
_____._____._____
_____._____._____
Lower: _____._____. Upper: _____._____. Diff: _____._____. Returns: _____._____.
ID: _____._____._____
=====
Data for same question from each household member           Persnr: _____._____.
Check- :
boxes:
Write-ins:
:
:
:
Enter---PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10---PF11---PF12
HELP UP DOWN <<<< >>>> MORE +UP +DOWN DEFER VALID COMIT QUIT
E000 xxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxx
    
```



### III. Looking at the Screen

The Coder must become familiar and locate the following items on the screen:

Headers	Header lines are displayed in the top centre lines of each screen. The first line is a general header for the system; the second line identifies the coding activity and variable you are working with.
Program and map names	The program and map names are displayed in the top left corner of each screen. The first line is the program name; the second line is the map name.
Date and time	The current date and time are displayed in the top right corner of each screen. The first line is the date and its format is DD/MM/YY. The second line is the time and its format is HH:MM:SS.S
Write-in to be coded	The write-in response to be coded, set as uncodable or deferred to later.
List of phrases and codes returned by ACTR	<p>A list of "possible" matching phrases and codes generated by ACTR during the Batch jobstream for the write-in response to be coded.</p> <p>ACTR is generalized software developed by the General Systems section to perform Automated Coding by Text Recognition from a reference list of phrases and codes referred to as the ACTR database.</p>
Type	<p>If this field has a value of "M", it indicates that the write-in response to be coded was matched by ACTR to a phrase which has an "exclusion clause".</p> <p><i>An exclusion clause is a type of parse data which allows storage of many duplicate phrases with different codes on the ACTR database.</i></p>
Code	Data entry field where a coder may type a code.
Select	Data entry field where a coder may select a code (by typing an "S").
ID:PEDEA HNUM PERSNR CELL	The identifier of the person being coded and currently displayed on the top half of the screen.

	<p>PEDEA is the composite identifier for Province, federal Electoral District, Enumeration Area.</p> <p>HHNUM is the identifier of a household. A collective household starts with 9.</p> <p>PERSNR is the number within the household of the person being coded.</p> <p>CELL is the identifier for a check-box or write-in response.</p>
BOTTOM HALF of screen	<p>Data for the same question from each household member is displayed, one at a time, on the bottom half of the screen.</p> <p><i>Upon entry to a screen, the same person is displayed on the top and bottom half of the screen.</i></p>
Persnr: PERSNR	<p>The number within the household of the person currently displayed on the bottom half of the screen.</p>
Check-boxes	<p>When a question can be answered by marking one or more check-boxes on the Census questionnaire, the abbreviations (up to 7 characters) corresponding to each marked check-box are listed on the screen.</p>
Write-ins	<p>When a question can be answered by writing the response as one or more lines on the Census questionnaire, the write-in responses are listed on the screen.</p>
The control line	<p>The control line is the line at the bottom on the screen where the active function keys are listed.</p>
The message line	<p>The message line is the line at the bottom of the screen where messages and other prompts are displayed. Messages instruct the coders as to what should be done. Follow these instructions carefully.</p> <p>Each message is identified as xnnn where:</p> <p>x      A letter to identify the message category.</p> <p>nnn    A number from 001 to 999 assigned to each message.</p>
Categories of messages	<p>There are three categories of messages.</p> <p>I      information: requires attention but no intervention</p> <p>W      warning: requires attention and intervention</p> <p>E      error: requires <u>immediate</u> attention and intervention</p> <p>The coder must print the screen and notify his/her supervisor immediately when an error message (starting with a E) occurs.</p> <p><i>The Coder could refer to the Messages Manual for more details about the cause and actions to be taken.</i></p>

## IV. Using the Keyboard

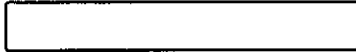
You will be using the keyboard to enter a code or a command. The Coder must be familiar with and be able to locate these keys on the keyboard.

### TYPEWRITER KEYS



The typewriter keys are the letter keys, number keys, punctuation keys and the space bar. You will use them to enter text and numbers as you do with a typewriter.

### Space bar



The space bar enters a space on the screen and replaces the previous value.

*Do not use the space bar to position the cursor on the screen.*

### Repetition of a key

Pressing a key enters a character once. After a brief pause, if you continue to hold down the key, the character repeats until you release the key.

### NUMERIC KEYPAD



The numeric pad is a group of keys on the right side of the keyboard similar to a calculator keyboard. They are provided for convenience when you are entering numeric characters.

### FUNCTION KEYPAD



or



Each function key is programmed to perform a specific function. Depending on the coding activity being performed, a function key is programmed to be either active or not active.

There are two rows of 12 function keys across the keyboard numbered from 1 to 24. The function keys numbered from 1 to 12 which are active are displayed on the Control line of the screen. On-line help is also available for all function keys.

The function keys are the **most important keys** of the Automated Coding system. Each function key is fully documented later in this document.

*On the screen, the function keys are referred as PF1 to PF24. On the keyboard, they could also be labelled F1 to F24. These labels are interchangeable.*





### EDITING KEYPAD

The editing keys are used to insert, replace or delete characters when the cursor is located on an input field.

Press












To INSERT a character in the middle of a field when the cursor is located on an input field. Pressing the Insert key also sets the keyboard in the insert mode operation. The Reset key must be used to terminate an insert mode operation.

- Press  To DELETE a character in a field when the cursor is located on an input field.
- Press  To ERASE all characters from the cursor location to the end of the field when the cursor is located on an input field.
- Press  To CANCEL a function which requires confirmation. The key labelled Ctr or Clear is used to cancel the execution of PF9 (Defer), PF23 (Uncodable) or PF12 (Quit).
- Press  To RESET the insert mode operation and be able to typeover an input field or to RESET a locked keyboard from a data entry error.

*A data entry error is a condition which exists when a coder tries to enter data on a protected field. The system beeps, locks the keyboard and displays a "little man" in the bottom left corner of the screen.*

#### CURSOR MOVEMENT KEYPAD

The cursor is a blinking block which marks where you can enter data. The cursor movement keys are used to move the cursor on the screen without affecting any of the information displayed.

- Press  The Return key moves the cursor to the next input field on the same screen, if any.
- Press  The Tab Forward key moves the cursor to the first character of the next input field. The cursor wraps around to the first input field when it reaches the last input field.
- Press  The Enter key is used by the coders to logon the Automated Coding system and to exit from a Help screen.
- The Enter key is not an active key for the coding activities and, therefore, must not be used while coding a write-in response.*
- Press  The Back Space key moves the cursor left one position on the input field.
- Press  The Tab Back key moves the cursor to the first character of an input field or to the preceding input field, if any.
- Press   
   The arrow keys move the cursor in the direction of the arrow. The cursor wraps around the screen when it hits the edge (left, right, top or bottom) of the screen.

**PRINT SCREEN KEY**

You may be requested to print a screen to refer a problem to your supervisor.

Press



The Print key sends the information displayed on the screen to be printed on the printer linked to your display station.





## V. To Get On-line Help

Help screens are readily available to coders to get on-line assistance.

Press PF1 To display a Help menu which lists the topics for which information is available.

Enter a ? for the topic of interest Use the Tab Forward key or Tab Back key to position the cursor beside the topic of interest, enter a ? and press Enter to obtain the information.

### Help Menu after PF1 is pressed during Expert Coding

```

HEXPERT1          1996 CENSUS OF POPULATION / AUTOMATED CODING
                   EXPERT CODING
                   ** HELP SCREEN **
                   Information available on the following topics:

1. Usage of input screen      -
2. PF-Key usage
  PF1  HELP      --  PF17  REACTR  --
  PF2  UP        --  PF18  HISTORY --
  PF3  DOWN      --  PF19  MULTI  --
  PF4  <<<<<    --  PF20  ACTR   --
  PF5  >>>>>    --  PF22  TRANSLA --
  PF6  MORE      --  PF23  NOCODE --
  PF7  +UP       --
  PF8  +DOWN     --
  PF9  DEFER     --
  PF10 VALID     --
  PF11 COMIT     --
  PF12 QUIT      --

3. Questions and abbreviations
   Relationship to person 1  --
   Languages                 --
   Place of birth           --
   Citizenship               --
   Ethnic Origin            --
   Population group         --
   Mobility                  --
   Education                --
   Registered Indian        --
   Industry/Occupation      --
   Year of immigration      --

                                     (type ? to select)
***-----***
*** PRESS ENTER TO RETURN TO INPUT SCREEN ***
***-----***

```

Three (3) examples of Help screens follow.

Help on PF key usage after ? entered beside PF6

```
HPF6MOR1          1996 CENSUS OF POPULATION / AUTOMATED CODING
                  *** HELP SCREEN ***



|     |      |     |
|-----|------|-----|
| 000 | 0000 | 00  |
| 0 0 | 0    | 0   |
| 000 | 000  | 000 |
| 0   | 0    | 0 0 |
| 0   | 0    | 00  |



Key : PF6
Name : MORE
Description : display more data on a
              supplementary screen

=====
=

Function : display more variables about the members of a
           household on a supplementary screen.

Instructions for use : press PF6 anywhere in input screen to display more
                     variables.

**-----**
*** PRESS ENTER TO RETURN TO MAIN HELP SCREEN ***
**-----**
```

Help on a Question and its abbreviations after ? is entered beside Population Group

```

HPF6MOR1          1996 CENSUS OF POPULATION / AUTOMATED CODING
                  *** HELP SCREEN ***

Question and abbreviations

Question:         19. POPULATION GROUP
                  Is this person:

Explanation:     This information is collected to support programs which
promote          equal opportunity for everyone to share in the
                  social, cultural and economic life of Canada.

Abbreviations:
LAT_AME: Latin American          WHITE:
JAPAN.  : Japanese             CHINESE:
FILIP.  : Filipino             KOREAN:
BLACK   : (e.g. African, Haitian, Jamaican, Somali)
S ASIAN: South Asian (e.g., East Indian, Pakistani, Punjabi, Sri Lankan)
SE ASIA: South East Asian (e.g., Cambodian, Indonesian, Laotian, Vietnamese)
ARAB/WA: Arab/West Asian (e.g., Armenian, Egyptian, Iranian, Lebanese,
Moroccan)

**-----**
*** PRESS ENTER TO RETURN TO MAIN HELP SCREEN ***
**-----**
    
```

Help on Expert Coding after ? entered beside Usage of input screen

```

|EXPERETO          1996 CENSUS OF POPULATION / AUTOMATED CODING          04/06/96|
|MEXPERT1          EXPERT CODING - ETHNIC ORIGIN                        12:00:00.0|
|
| Write-in to be coded                                          Type Code
| CAICOS                                                       - - - - - /|\
|
| Phrases returned by ACTR          Score   Codes (S)elect |
| CAICOS ISLANDER                   0.659   196           |
| CAICOS ISLANDS BLACK               0.439   431           |
|                                     /|\           |
BASIC STEPS FOR EXPERT CODING:
-----
1. Select a code from list by typing S in the selection field ----- |
   or Enter a numeric code -----
2. Press PF10 to validate the code selected or entered.
3. Repeat steps 1 and 2 until you are satisfied with the code.
4. Press PF11 to commit the code.

On the bottom half of the screen, data is displayed for
the same question from each member of the household.

**-----**
*** PRESS ENTER TO RETURN TO MAIN HELP SCREEN ***
**-----**
    
```



## VI. To Display Members of the Household

Write-in and check-box responses for the same variable (question) could be displayed for each member of the household for some coding activities.

Press PF2 To **GO UP** the list of members in a household to display information about the previous person on the bottom half of the screen.

Press PF3 To **GO DOWN** the list of members in a household to display information about the next person on the bottom half of the screen.

*When data is available for only one member of the household, the same person is displayed when PF2 or PF3 is pressed.*

*When the last member of the household is displayed on the screen and PF3 is pressed, the system wraps around the household to display the first member of the household.*

*When the first member of the household is displayed on the screen and PF2 is pressed, the system wraps around the household to display the last member of the household.*

Expert Coding screen after PF3 is pressed to display next member of household.

```

EXPERETO          1996 CENSUS OF POPULATION / AUTOMATED CODING          02/09/96
MEXPERT1          EXPERT CODING - ETHNIC ORIGIN                        14:23:12.5

Write-in to be coded                                     Type Code
GUIANA

Phrases returned by ACTR                                Score Codes (S)elect
BRITISH GUIANA                                         0.676 193 -
DUTCH GUIANA                                           0.676 220 -

Lower: 0.000 Upper: 0.000 Diff: 0.00 Returns: 0
ID: 32019600 111 0001 16
=====
Data for same question from each household member      Persnr: 2
Check- :
boxes:

Write-ins: DUTCH GUIANA
:
:
:

-Enter---PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10---PF11---PF12-
HELP UP DOWN <<<< >>>> MORE +UP +DOWN DEFER VALID COMIT QUIT
    
```



**VII. To Scroll Response Fields**

The information to be displayed for a field may, in some cases, exceed the size of the window for that field on the screen. Scrolling allows the response to be moved to the left or to the right across the window.

- Press PF4 To **SCROLL TO THE LEFT** the fields on the screen which have a < or <> on the right side of each field.
- Press PF5 To **SCROLL TO THE RIGHT** the fields on the screen which have a > or <> on the right side of each field.

Expert Coding screen with response fields which require scrolling

```

EXPERETO          1996 CENSUS OF POPULATION / AUTOMATED CODING          01/09/96
MEXPERT1          EXPERT CODING - ETHNIC ORIGIN                        15:56:19.5

Write-in to be coded                                     Type Code
ALL MY ANCESTORS ARE FROM DIFFERENT COUNTRIES ACROSS SOUTHERN E >

Phrases returned by ACTR                                Score Codes (S)elect
SOUTHERN EUROPE                                       21.491  083      -
SOUTHERN RHODESIA                                     0.062  174      -

Lower:      0.000   Upper:      0.000   Diff:      0.00   Returns:  0
ID: 35011362 135 0004 16

=====
Data for same question from each household member      Persnr:      4
Check-      :
boxes:

Write-ins: ALL MY ANCESTORS ARE FROM DIFFERENT COUNTRIES ACROSS SOUTHERN E >
:
:
:

-Enter---PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12-
        HELP UP   DOWN <<<< >>>> MORE +UP   +DOWN DEFER VALID COMIT QUIT
    
```

Expert Coding screen after PF5 is pressed to scroll to the right the response fields

```

EXPERETO          1996 CENSUS OF POPULATION / AUTOMATED CODING          01/09/96
MEXPERT1          EXPERT CODING - ETHNIC ORIGIN                        15:56:19.5

Write-in to be coded                                     Type Code
UROPE                                                     <

Phrases returned by ACTR                                Score Codes (S)elect
SOUTHERN EUROPE                                         21.491  083      -
SOUTHERN RHODESIA                                       0.062  174      -

Lower:      0.000  Upper:      0.000  Diff:      0.00  Returns:  0
ID: 35011362 135 0004 16
=====
Data for same question from each household member          Persnr:      4
Check-      :
  boxes:
Write-ins: UROPE                                         <
      :
      :
      :

-Enter---PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12-
      HELP UP    DOWN <<<< >>>> MORE +UP  +DOWN DEFER VALID COMIT QUIT
    
```



## VIII. To View Supplementary Screens

During coding, a coder could view more screens of information about the person who requires coding.

*When a General coder (Tier1) performs Quality Control coding of System codes, PF6 is not active because the Coder is asked to simulate and evaluate the coding method of the system without bias from additional information about the respondent. This restriction is not applicable to Expert coders (Tier 2).*

Press	To display <b>MORE</b> variables about the person who requires coding on supplementary screens.
What is displayed?	<p>The <b>Cultural screen</b> is displayed when PF6 is pressed during coding for all variables except Mobility and Major Field of Study variables.</p> <p>The <b>Major Field of Study screen</b> is displayed when PF6 is pressed during coding of the Major Field of Study variable.</p> <p>The <b>Mobility screen</b> is displayed when PF6 is pressed during coding for the Mobility variables or when PF12 is pressed from the Cultural screen during coding of Indian Band/First Nation or Language variables.</p> <p>Each write-in response is displayed as it was captured from the Census questionnaire</p> <p>Check-box entries are displayed in the sequence they are list on the Census questionnaire. Abbreviations (up to seven characters) are used to represent each check-box response. Use the on-line Help (PF1) or refer to page 97 for a list of abbreviations for check-box responses by question.</p>

## **PF Keys available on supplementary screens**

The following PF Keys are functional when a supplementary screen is displayed.

- Press **PF1** To display a **HELP** menu which lists the topics for which information is available; one topic is the abbreviations used to display check-box responses.
- Press **PF2** To **GO UP** the list of members in a household to display information about the previous person on the screen.
- Press **PF3** To **GO DOWN** the list of members in a household to display information about the next person on the screen.
- Press **PF4** To **SCROLL TO THE LEFT** the write-in fields which have a < or <> on the right side of each field.
- Press **PF7** To **SCROLL TO THE RIGHT** the check-box fields which have a < or <> on the right side of each field.
- Press **PF12** To **QUIT** the screen of supplementary information and proceed with the next step.

*When the write-in response is an Indian Band/First Nation or a Language response, a second screen is displayed when **PF12** is pressed from the first screen of information. Press **PF12** again to return to the coding screen.*

Cultural screen after PF6 is pressed during Interactive coding for all variables; except Major Field of Study and Mobility

```

1996 CENSUS OF POPULATION / AUTOMATED CODING                23/09/96
MCULTRL1                CULTURAL                            16:17:23.2
Write-ins & check-boxes
Rel to Person-1 : SON/DAU _____
Official Lang   : ENGLONL _____ Birth Date: 12/06/54 Sex: M
Non-off Lang    : _____
                : _____
                : _____
Home language   : _____ ENGLISH _____
Mother tongue   : _____ ENGLISH _____
Place of birth  : _____
Citizenship     : _____ CANBRTH _____
Immigrant Status: _____ Yr of Immigratn : _____
Ethnic origin   : ENGLISH ANCESTORS _____
                : _____
Population Grp  : _____ WHITE _____
                : _____
Aborig Slf Rept : _____ Ind Registration: NO On/Off Reserve: _____
Indian Band     : _____
ID: 36145611 113 0002
Enter---PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10---PF11---PF12
      HELP UP   DOWN <<<< >>>>                                QUIT
    
```

Major Field of Study screen after PF6 is pressed during Interactive Coding for Major Field of Study

```

NDISMFS                1996 CENSUS OF POPULATION / AUTOMATED CODING                21/12/96
MMFS1                MAJOR FIELD OF STUDY                            13:17:23.3
                Number of years
Secondary/Elementary education : _____ 12
University education : _____ 02
Other Post-secondary education : NONE _____
School attendance : NO _____
Diploma, Certificate or Degree : SECSCE BACHDEG _____
                : _____
                : _____
                Industry : 7751 OFFICES OF ARCHITECTS _____
                Occupation : 4195 PERSONNEL CLERKS _____
Major field of study : ADMINISTRATION _____
                : _____
Relationship to person 1 : HUS/WIF _____
                : _____
Birth date : 10/04/49 Sex : M
ID: 35016203 107 0003
Enter---PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10---PF11---PF12
      HELP UP   DOWN <<<< >>>>                                QUIT
    
```

Mobility screen after PF6 is pressed during coding of the Mobility variables or after PF12 is pressed from the Cultural screen for the Indian Band/First Nation or Language variables

```

NDISMOB              1996 CENSUS OF POPULATION / AUTOMATED CODING              21/10/96
MMOBLTY1              MOBILITY                                              11:34:42.1

      1 YEAR AGO
    Inside Canada : SAMADDR
                  :
    Outside Canada : _____
                  : _____


      5 YEARS AGO
    Inside Canada : DIFPRTE
                  : NEPAWA, ONTARIO
    Outside Canada : _____
                  : _____

Relationship to person 1 : PERSON1
                        : _____
    Birth date : 31/05/60              Sex: M
ID: 35010163 055 0001

Enter---PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10---PF11---PF12
      HELP UP     DOWN                                  QUIT
  
```

## IX. To Scroll the ACTR List

For each write-in response which the system is not able to code, a list of up to ten (10) phrases and codes are generated by ACTR to assist the Coder during Interactive Coding. The size of the screen allows only three (3) of these ACTR phrases and codes to be displayed at once. Scrolling allows the ACTR list to be moved up and down across the window on the screen.

Press  To **SCROLL UP** the list of ACTR phrases and codes when there is a + sign beside the first entry of these fields.

Press  To **SCROLL DOWN** the list of ACTR phrases and codes when there is a + sign beside the last entry of these fields.

The phrases displayed are **sorted by score**. All phrases and codes returned by ACTR have a score greater than the Lower Threshold value used to generate the ACTR list (either in Batch or On-line).

*An Expert coder has the option to query the ACTR database on-line to obtain a list which is more current or more exhaustive. See page 31 to learn more about PF20.*

*The coder should scroll the entire list of ACTR phrases and codes at least once before making a decision in order to assign the most appropriate code for the write-in response.*

Expert Coding screen with a list of ACTR phrases which requires scrolling

```

EXPERETO          1996 CENSUS OF POPULATION / AUTOMATED CODING          01/09/96
MEXPERT1          EXPERT CODING - ETHNIC ORIGIN                        15:56:19.5

Write-in to be coded                                          Type Code
SOUTH WEST AMERICA

Phrases returned by ACTR                                     Score Codes (S)elect
SOUTH AMERICA                                               3.349  220      -
INCAS SOUTH AMERICA                                         2.232  210      -
AMERICA                                                       0.621  230      - +
Lower:      0.000  Upper:      0.000  Diff:      0.00  Returns:  0
ID: 35011362 135 0004 16

=====
Data for same question from each household member          Persnr:      4
Check-      :
boxes:

Write-ins: SOUTH WEST AMERICA
:
:
:

-Enter---PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12-
HELP UP    DOWN <<<< >>>> MORE +UP +DOWN DEFER VALID COMIT QUIT
    
```

Expert Coding screen after PF8 is pressed to scroll down the list of ACTR results

```

EXPERETO          1996 CENSUS OF POPULATION / AUTOMATED CODING          01/09/96
MEXPERT1          EXPERT CODING - ETHNIC ORIGIN                        15:56:19.5

Write-in to be coded                                          Type Code
SOUTH WEST AMERICA

Phrases returned by ACTR                                     Score Codes (S)elect
WEST FRANCONIAN                                              0.151  021      - +
WEST GERMAN                                                  0.151  024      -
WEST EUROPE                                                  0.151  083      - +
Lower:      0.000  Upper:      0.000  Diff:      0.00  Returns:  0
ID: 35011362 135      4 16

=====
Data for same question from each household member          Persnr:      4
Check-      :
boxes:

Write-ins: SOUTH WEST AMERICA
:
:
:

-Enter---PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12-
HELP UP    DOWN <<<< >>>> MORE +UP +DOWN DEFER VALID COMIT QUIT
    
```

## X. To Call or Recall ACTR

ACTR is a generalized software which performs "Automated Coding by Text Recognition" from a reference list of phrases and codes referred to as the ACTR database. An Expert coder has the option to dialog with the ACTR database on-line to obtain an up-to-date or more exhaustive list.

Press  To **RECALL** the list of ACTR phrases and codes initially generated by the Batch jobstream for a write-in response. This list is displayed by default on the coding screens for both General Coding and Expert Coding.

Press  To **CALL ACTR** on-line using new matching parameters for a new list of ACTR phrases and codes for a write-in response.

### ACTR matching parameters

The Coder must supply ACTR matching parameters before PF20 is pressed to limit the search of possible matches.

Lower threshold: Phrases with a score greater than the Lower threshold are considered as a possible match.

values: 0 to 9999.999 and must be less than or equal to Upper threshold.

Upper threshold: Phrases with a score greater than the Upper threshold are considered as a winner.

values: 0.0001 to 99999.99 and must be equal to or greater than the Lower threshold and must not be 0.

Percent difference: Used to determine the winner when more than one phrase has a score greater than the Upper threshold.

values: 0.01 to 999.99

Returns: Maximum number of scored phrases returned by ACTR.

values: 1 to 10

Expert Coding screen after PF20 is pressed to call ACTR on-line with new matching parameters

```

EXPERETO          1996 CENSUS OF POPULATION / AUTOMATED CODING          01/09/96
MEXPERT1          EXPERT CODING - ETHNIC ORIGIN                        15:56:19.5

Write-in to be coded                                          Type Code
SOUTH WEST AMERICA
Phrases returned by ACTR                                     Score Codes(S)elect
SOUTH AMERICA                                             3.349  220
                                                         -

Lower:      3.0      Upper:      5.0      Diff:      1.0      Returns:  10
ID: 35011362 135 0004 16
=====
Data for same question from each household member           Persnr4
Check-   :
boxes:
Write-ins: SOUTHERN WEST AMERICA
:
:
:
Enter--PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12
      HELP UP   DOWN <<<< >>>> MORE +UP  +DOWN DEFER VALID COMIT QUIT
    
```

When PF20 is pressed in the above example, the possible phrase SOUTH AMERICA is displayed because its score (3.349) is greater than the Lower threshold. The next possible phrase INCAS SOUTH AMERICA with a code of 210 is not displayed because its score (2.232) is smaller than the Lower threshold.

⇒ For more information about ACTR, consult the "User Documentation – Automated Coding by Text Recognition – version 1.07, Research & General System Division".

**Selective use of ACTR on-line calls**

During Expert Coding, you should make selective use of PF20 to call ACTR because this function is expensive when used on-line during prime time. In order to make efficient use of the function to call ACTR on-line, Expert coders are expected to be familiar with ACTR parsing and matching strategies. A few guidelines follow in order to minimize unnecessary ACTR on-line calls.

<p>ACTR matching parameters of Batch jobstream</p>	<p>For each variable, you must know which values were used for the matching parameters by the Batch jobstream to generate the ACTR list. This information will help you determine the values to use for the matching parameters to call ACTR on-line.</p>
--	---



When the ACTR list may be outdated

It is recommended to call ACTR on-line when the message below is displayed **once you verified** that indeed the ACTR list generated by the Batch jobstream for a write-in response is **outdated**. A hardcopy listing of updates made to the ACTR database should be available to the coders during production. To refresh the ACTR list, it is suggested to call ACTR on-line using the **same** values for the matching parameters than those used by the Batch jobstream.

I126 ACTR LIST MAY BE OUTDATED. ACTR DATABASE WAS MODIFIED.

When the ACTR database was **not** modified

It is not recommended to call ACTR on-line again for a write-in response:

- when the value used for the Lower threshold to generate the ACTR list is 0, that is all possible matches have been returned; or
- when the write-in response is a single word (direct match); or
- when you are doing Expert Quality Control of System codes.

When no ACTR results returned

It is not recommended to call ACTR on-line when the message below is displayed unless **different** values are specified for the matching parameters than those used by the Batch jobstream.

I026 NO ACTR RESULTS RETURNED BY THE BATCH JOBSTREAM.

ACTR matching parameters

The best combination of ACTR parameters for indirect matching varies depending on the response being coded and the ACTR database being used. In this system, there are no default values.

If you decide to call ACTR on-line and you have no idea which values to use for the ACTR matching parameters, the following are suggested as a starting point to obtain an exhaustive list of all possible matching phrases.

Lower threshold:	0	(or very low value)
Upper threshold:	99999.99	(or very high value)
Percent difference:	999.99	(maximum value)
Return:	10	(maximum value)



## XI. To View Coding History

During Expert Coding, a coder could view the coding history of a write-in response on a supplementary screen. The history screen provides useful information when doing Quality Control coding.

Press **PF18** To display the **CODING HISTORY** of a write-in response on a supplementary screen.

What is displayed? The write-in response to be coded is displayed with **up to three (3) codes** assigned at different levels of coding along with the standard description for each code. The coders who have assigned each of these codes are identified as well as the date each of these codes were assigned.

A **System code** or a **Manual code** is displayed depending if the write-in response was initially coded by the system or by a General coder.

*A Manual code of -3 indicates that the write-in response was referred to the Tier 2 level and, consequently, is not subject to Quality Control coding.*

A **first QC code** is displayed if the write-in response was assigned an independent code by a General coder during the first Quality Control coding.

A **second QC code** is displayed if the write-in response was assigned an independent code by a General coder during the second Quality Control coding.

*A first or second QC code of -3 indicates that the write-in response was referred to the Expert coders (Tier 2) during Quality Control coding.*

*The number of referral requests must be closely monitored for each coder.*

### PF Keys available on history screen

The following PF Keys are functional when a coding history screen is displayed:

Press **PF4** To **SCROLL TO THE LEFT** the write-in and code description fields which have a < or <> on the right side of each field.

Press **PF5** To **SCROLL TO THE RIGHT** the write-in and code description fields which have a > or <> on the right side of each field.

Press **PF12** To **QUIT** the screen of coding history and proceed with the next step.

Coding History screen after PF18 is pressed

```
NHISTORY          1996 CENSUS OF POPULATION / AUTOMATED CODING          03/10/96
MHISTRY1         EXPERT CODING - ETHNIC ORIGIN                          12:45:23.1

Write-in : PAYS DE GALES

System code : 004          Type : _          01/10/96
Description : WELSH

Manual code : _____  Coder ID : ____  Name : _____
Description :

1st QC code : -3          Coder ID : 32   Name : JOHN          PETERSON
Description :

2nd QC code : 013         Coder ID : 10   Name : ANDREE         02/10/96
Description : FRENCH          BLAIS

ID: 32110003 123 0002 16          03/10/96

-Enter---PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12-
                    <<<<  >>>>
                                           QUIT
```

## XII. When You Are Ready to Make a Decision

A **final** code must ultimately be assigned by the Expert Coder to the write-in response. An Expert coder may defer coding to a later time in order to research the more difficult cases.

The following is an **overview** of the options which are available when you are ready to make a decision. Step-by-step instructions for each coding activity are provided later in this document - refer to pages 50 to 66.

*A code assigned by an Expert coder to a write-in response is **final**.*

- Press **PF9** To **DEFER** coding of a write-in response to a later time.  
Press **PF9** again to confirm your decision to defer coding.  
Press **CLR** to cancel your decision and continue coding.
- Press **PF10** To **VALIDATE** the code selected or keyed by requesting the system to display a **standard description** for the code in the message line at the bottom of the screen.
- When the code is not valid or when its standard description is not suitable for the write-in response, the coder should select or enter a new code until he/she is satisfied that the code is correct.
- Press **PF11** To **COMMIT** the code selected or keyed for a write-in response.  
A code must always be **validated before** it can be committed (saved).
- Press **PF22** To **TRANSLATE** the standard description displayed in the message line at the bottom of the screen for a code.
- As a default, all fields and messages are displayed in the preferred official language of a coder, however, the write-in response to be coded could be in French, English or any other language. The standard description of a code could be translated to validate a code for a write-in response in the other official language.*
- Press **PF23** To set a write-in response as **UNABLE TO CODE**, that is a code of -2 is assigned to the write-in response.  
Press **PF23** again to set the write-in as unable to code.  
Press **CLR** to cancel your decision and continue coding.

Expert Coding screen after PF9 is pressed to defer coding to a later time

```
EXPERETO          1996 CENSUS OF POPULATION / AUTOMATED CODING          04/11/96
MEXPERT1          EXPERT CODING - ETHNIC ORIGIN                        11:36:12.5

Write-in to be coded                                         Type Code
CAICOS

Phrases returned by ACTR                                     Score Codes (S)elect
CAICOS ISLANDER                                           0.659  196
CAICOS ISLANDS BLACK                                       0.439  431
                                                                 -
                                                                 -

Lower:      0.000  Upper:      0.000  Diff:      0.00  Returns:  0
ID: 31510213 033 0002 16

=====
Data for same question from each household member          Persnr:      2
Check-   :
  boxes:

Write-ins: CAICOS
         :
         :
         :

Enter---PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10---PF11---PF12
        HELP UP   DOWN <<<< >>>> MORE +UP  +DOWN DEFER VALID COMIT QUIT
1049 HIT PF9 AGAIN TO DEFER TO LATER, OR HIT CLR TO CANCEL.
```

When PF23 is pressed, the screen is the same as the one above except for the message line.

I118 PRESS PF23 AGAIN TO SET UNCODABLE, OR HIT CLR TO CANCEL.

Expert Coding screen after PF10 is pressed to validate the code entered - the valid code is 013

```

EXPERETO      1996 CENSUS OF POPULATION / AUTOMATED CODING      02/10/96
MEXPERT1      EXPERT CODING - ETHNIC ORIGIN                      10:30:01.1

Write-in to be coded                                     Type Code
FRENCH                                               207

Phrases returned by ACTR                                Score Codes (S)elect

Lower:      0.000 Upper:      0.000 Diff:      0.00 Returns:  0
ID: 33115611 013 0001 16
=====
Data for same question from each household member      Persnr:  1
Check-   :
boxes:

Write-ins: FRENCH
:
:
:

-Enter---PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10---PF11---PF12-
HELP UP DOWN <<<< >>>> MORE +UP +DOWN DEFER VALID COMIT QUIT
W028 ENTER A CODE. CODE ENTERED IS NOT VALID.
    
```

Expert Coding screen after PF10 is pressed to validate a code selected from the list of ACTR results

```

EXPERETO      1996 CENSUS OF POPULATION / AUTOMATED CODING      01/09/96
MEXPERT1      EXPERT CODING - ETHNIC ORIGIN                      15:56:19.5

Write-in to be coded                                     Type Code
INDIENNE                                               242

Phrases returned by ACTR                                Score Codes (S)elect
INDIENNE ASIE                                         1.322 122      -
INDIENNE BANDE                                       1.322 242      -
INDIENNE DE L'OUEST NOIR                             0.528 434      -
Lower:      0.000 Upper:      0.000 Diff:      0.00 Returns:  0
ID: 32110003 123 0002 16
=====
Data for same question from each household member      Persnr:  2
Check-   :
boxes:

Write-ins: INDIENNE
:
:
:

-Enter---PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10---PF11---PF12-
HELP UP DOWN <<<< >>>> MORE +UP +DOWN DEFER VALID COMIT QUIT
NORTH AMERICAN INDIAN
    
```

Expert Coding screen after PF22 is pressed to translate the standard description for the code entered and validated 216 (DUTCH)

```
EXPERETO          1996 CENSUS OF POPULATION / AUTOMATED CODING          02/10/96
MEXPERT1          EXPERT CODING - ETHNIC ORIGIN                        10:30:01.1

Write-in to be coded                                     Type Code
HOLLANDAIS                                             022

Phrases returned by ACTR                                Score Codes (S)elect

Lower:      0.000  Upper:      0.000  Diff:      0.00  Returns:  0
ID: 36145611 033 0001 16
=====
Data for same question from each household member          Persnr:    1
Check-   :
  boxes:

Write-ins: HOLLANDAIS
         :
         :
         :

-Enter---PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12-
        HELP UP   DOWN <<<< >>>> MORE +UP  +DOWN DEFER VALID COMIT QUIT
HOLLANDAIS
```



### XIII. To Assign Multiple Codes and Check-boxes

When a write-in response to the Language, Citizenship or Ethnic Origin questions provided by a respondent can be broken up into many separate responses, this option allows an Expert coder to assign multiple codes or check-boxes to that write-in response.

Press	<div style="border: 1px solid black; padding: 2px; display: inline-block;">PF19</div>	To display a screen which assists the Expert Coder in the assignment of <b>MULTIPLE</b> codes or check-boxes to a write-in response.
Variable where it applies		The option to assign multiple codes and/or check-boxes is available for: <b>Mother Tongue, Home Language, Non-official Language, Ethnic Origin and Citizenship.</b>
Basic steps to follow		<p>The basic steps to assign multiple codes or check-boxes are:</p> <ul style="list-style-type: none"> <li>⇒ The Expert Coder analyses each word of the write-in response and mentally breaks it into many separate write-in responses. For each part of the write-in response, an additional code or check-box could be assigned.</li> <li>⇒ The Expert Coder must assign at least one code to the write-in response.</li> <li>⇒ Additional codes could be assigned by the Expert Coder. The maximum number of codes which can be assigned is different depending on the variable being resolved.</li> <li>⇒ For Home Language, Mother Tongue and Citizenship, an additional check-box entry can be marked (with an X) by the Expert Coder for any check-box which was not entered by the respondent.</li> <li>⇒ Once all codes and check-box entries have been entered for a write-in response, they must be validated by pressing PF10. All codes and check-boxes are validated at once.</li> <li>⇒ When the validation is successful, the codes and check-box entries are saved by pressing PF11.</li> </ul>
Restrictions		<ul style="list-style-type: none"> <li>⇒ If a check-box was entered by the respondent, it will be marked with an X and will be a protected field (i.e. cannot be overwritten).</li> <li>⇒ If a check-box was entered by the Expert Coder, it will also be marked with an X but will not be a protected field.</li> <li>⇒ If a code was assigned by the system or by a coder to any of the other lines of a write-in response, this code will be displayed and will be a protected field (i.e. cannot be overwritten).</li> </ul>

Limit on the number of codes or check-boxes	The number of codes or check-boxes which can be assigned is different depending on the variable being resolved.
Mother Tongue	⇒ minimum 1 code and maximum 2 codes; plus check-boxes
Home Language	⇒ minimum 1 code and maximum 2 codes; plus check-boxes
Non-official Language	⇒ minimum 1 code and one additional code for each blank write-in line for up to 3 codes; no check-box
Ethnic Origin	⇒ minimum 1 code and maximum 6 codes; no check-box
Citizenship	⇒ minimum 1 code and maximum 2 codes; plus check-boxes

*The additional codes and check-boxes created by Expert coders are referred as "unanticipated codes and check-box entries" on the E&I database. When these are loaded on the E&I database, control counts and audit trails are generated for each additional code and check box entry created by Expert coders and these will be closely monitored by E&I operations.*

### **PF Keys available when assigning multiple codes and check-boxes**

The following PF keys are functional when a screen to assign multiple codes and check-boxes to a write-in response is displayed.

Press  PF10 To **VALIDATE** all codes and check-box entries at once and to display the standard description for each code assigned.

When any of the code or check-box entry is not valid or when one of the standard description displayed is not suitable for the write-in response, the Coder should modify the codes or check-box entries until he/she is satisfied that they are correct.

Press  PF11 To **COMMIT** all codes and check-box entries entered for a write-in response. These must always be successfully validated before they can be committed (saved).

Press  PF12 To **QUIT** the coding screen for a multiple response and return to the main coding screen.

**Examples of the coding screens to assign multiple codes or check-boxes for each variable follow.**

Expert Coding screen after PF19 is pressed for a Home Language write-in response

```

                1996 CENSUS OF POPULATION / AUTOMATED CODING                24/11/96
MHLNMULT1      ASSIGN CODES TO MULTIPLE WRITE-INS                          10:30:54.1
                HOME LANGUAGE

ID : 28734322 014 0005 HLN 06

What language(s) does this person speak most often at home?

ENGLISH GERMAN WITH DAD

(Assign a minimum of 1 code; and a maximum of 2 codes)

Code      Standard description
-----
(Assign an X or leave as is)
   English
   French

Enter---PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10---PF11---PF12
                                           VALID COMIT QUIT
    
```

Expert Coding screen after PF19 is pressed for a Non-official Language write-in response

```

                1996 CENSUS OF POPULATION / AUTOMATED CODING                24/11/96
MNOLUL1      ASSIGN CODES TO MULTIPLE WRITE-INS                          10:30:54.1
                NON-OFFICIAL LANGUAGE

ID : 23415619 022 0001 NOL 04

What language(s) other than English or French, can this person speak well
enough to conduct a conversation?

SPANISH ITALIAN RUSSIAN
CHINESE _____ Code
                _____

(Assign a minimum of 1 code; and one additional code for each blank write-in
for up to 3 codes)
Code      Standard description
-----
-----
-----

Enter---PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10---PF11---PF12
                                           VALID COMIT QUIT
    
```

Expert Coding screen after PF19 is pressed for a Citizenship write-in response

```

NCITMULT          1996 CENSUS OF POPULATION / AUTOMATED CODING          24/11/96
MCITMUL1          ASSIGN CODES TO MULTIPLE WRITE-INS                   10:30:54.1
                   CITIZENSHIP

ID : 73175641 002 0002 CIT 03

Of what country is this person a citizen?

CANADIAN SPOUSE US BORN
(Assign a minimum of 1 code; and a maximum of 2 codes)
Code      Standard description
-----
(Assign an X or leave as is)
--        Canada, by birth
--        Canada, by naturalization

-Enter---PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12
                                                VALID COMIT QUIT
    
```

Expert Coding screen after PF19 is pressed for a Mother Tongue write-in response

```

MMTMULT1          1996 CENSUS OF POPULATION / AUTOMATED CODING          22/11/96
                   ASSIGN CODES TO MULTIPLE WRITE-INS                   14:28:05.1
                   MOTHER TONGUE

ID : 33115611 013 0001 08

What are the language(s) this person has learned at home in childhood and
still understands?

FRANCAIS ESPAGNOL PORTUG
(Assign a minimum of 1 code; and a maximum of 2 codes)

Code      Standard description
-----
(Assign an X or leave as is)
--        English
--        French

-Enter---PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12
                                                VALID COMIT QUIT
    
```

Expert Coding screen after PF19 is pressed for an Ethnic Origin write-in response

NETOMULT	1996 CENSUS OF POPULATION / AUTOMATED CODING	24/11/96
METOMUL1	ASSIGN CODES TO MULTIPLE WRITE-INS	10:30:54.1
	ETHNIC ORIGIN	
ID : 33115611 013 0001 ETO 16		
To which ethnic or cultural group(s) did this person's ancestors belong?		
SUISSE FRANCAIS BELGE ITALIAN		
(Assign a minimum of 1 code; and a maximum of 6 codes)		
Code	Standard description	
_____	_____	
_____	_____	
_____	_____	
_____	_____	
_____	_____	
_____	_____	

-Enter---PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10---PF11---PF12-

VALID COMIT QUIT



#### XIV. To Exit the Automated Coding System

When a coder wishes to end a coding session.

Press

**PF12**

To **QUIT** the Automated Coding system.

Press **PF12** again to confirm your decision to quit coding.  
Press any other key to cancel your decision and continue coding.

*You receive a message that the **NATURAL** session terminated normally.*

Type **Logoff**

Press **Enter**

*You receive the **MCC** logo.*

Now that you are familiar with the screens and keys of the Automated Coding system, you are ready to start coding.





## XV. Overview of the Quality Control Methodology

The Expert Coder must be familiar with the Quality Control methodology developed by SSMD for the Automated Coding system. During coding, a number of screens and computer-assisted functions are available to the Expert coders. These are to be used judiciously in order to fully address the requirements of Quality Control.

The purpose of Quality Control for System Coding is to assess the quality of codes assigned by the system (ACTR).

In order to accurately evaluate the quality of System Coding, the Expert Coder should access no more and no less information than what the system (ACTR) used to code. ACTR assigns a code using the write-in response itself, a reference file of phrases and codes and a coding algorithm based on Text recognition.

The purpose of Quality Control of Interactive Coding is to assess the quality of codes assigned by the General coders.

In order to accurately evaluate the quality of Interactive Coding, the Expert Coder should access the same reference material and computer-assisted options which the General coders used to code the write-in responses. A General coder assigns a code using the write-in response and other related responses from the respondent as well as an ACTR list of "possible" matches, on-line and hardcopy reference material (dictionaries, codebooks, etc...).

### Sampling strategy

The size of the sample and the basis on which write-in responses are sampled is different for codes assigned by the system than for codes assigned by the General coders. Codes assigned by General coders are sampled **randomly from each work unit** which is completed.

Coding results of the system are tabulated by code and write-in response in a System Quality Control Table for each variable. A batch program compares the current to previous coding results for each code/write-in combination. The frequency of occurrence and quality control status of each code/write-in combination are logged in the System Quality Control Table during this verification process. Prior to production, a number of code/write-in combination are identified as having **pre-approved quality** by Subject-matter experts. These cases are verified for consistency of coding by the batch program. They are excluded from the sample and not sent to Quality Control coding.

A sample is selected on a **minimum number of occurrence basis** from code/write-in combinations which have not yet been sampled and which do not have pre-approved quality. Each code/write-in combination sent to quality control coding is sampled once to keep the number of cases to be reviewed to a manageable size while ensuring effective coverage.

### **Verification strategy**

The same verification strategy is used for the sample of both write-in responses coded by the system or coded by General coders. Verification is based on a **majority-rule scheme** where up to three (3) codes (in addition to the production code) may be assigned by three different coders to write-in responses selected for quality control. Independent quality control coding is repeated until two (2) codes are the same for a write-in response or until an Expert coder decides what the final code will be.

The code assigned by an Expert coder to a write-in response is considered **final** and not subject to further verification. All codes which do not agree with the final code are attributed an error. A General coder who referred a write-in response to an Expert coder is not assigned an error, but the number of referral requests is closely monitored for each coder.

### **Analysis and rectification strategy**

Quality Control results are analyzed on an ongoing basis to assess whether the overall quality of coding is acceptable. Rectification is used to improve the quality of coding results. Rejected work units are reviewed by Expert coders to recode work of General coders of substandard quality. The System Quality Control Table where system coding results are tabulated is analyzed by Subject-matter experts to formulate post-production fixes to areas which are highly sensitive or which have high error rates. During production, corrections to the ACTR database (excludes re-parsing) can be specified by Subject-matter to rectify and improve the quality of system coding.

## XVI. Steps for Expert Coding

This section provides instructions to the Expert Coder who has selected one of the following from the Menu of Expert Coding activities:

- Expert Quality Control of System Coding
- Expert Quality Control of Interactive Coding
- Referral Coding
- Coding of Write-ins Deferred to Later

The Coder will view the write-in response on a computer screen along with other reference material to assign a code. The computer assists the coder in that it may propose possible matching phrases and codes from ACTR. ACTR is generalized software developed by the General Systems Section to perform "Automated Coding by Text Recognition" from a reference list of phrases and codes referred to as the ACTR database.

There are three (3) possible cases which may occur during Expert Coding:

1. The write-in to be coded has an ACTR list of phrases and codes which is most current.
2. The write-in to be coded has an ACTR list of phrases and codes which may be outdated.
3. The write-in to be coded has no ACTR list of phrases and codes.

The coding instructions are different for each of these cases and they will be illustrated in this section. The coder must carefully follow each step in order to maintain an acceptable quality of coding. The code assigned by the Expert Coder is **final**.

During Expert Coding, the coder must keep a close watch on the following conditions:

### **Outdated list of ACTR phrases and codes**

The list of phrases and codes returned by ACTR are outdated when updates are made to the ACTR database after the list of phrases was generated by the Batch jobstream for each write-in response which the system is not able to code. When this condition occurs, the system displays a warning message to the coder.

**W048 ACTR LIST MAY BE OUTDATED. CODER AUTHORIZED TO KEY A CODE.**

When this condition occurs, the coder must verify if special coding instructions are to be followed as a result of recent updates to the ACTR database. The coder could also request a hardcopy list of updates made to the ACTR database in order to verify if any of the possible phrases and codes returned by ACTR are indeed outdated. It is important to code each write-in response from the most recent list of codes to maintain an acceptable quality of coding.

When there are indications that the ACTR list is indeed outdated, the Expert Coder could call ACTR on-line for a revised up-to-date list of possible phrases and codes. It is suggested to call ACTR on-line using the same matching parameters than those used by the Batch jobstream. For more details, refer back to the section TO CALL OR RECALL ACTR.

## Identical recurrent write-in responses

Identical write-in responses (with the exact same spelling) could be repeated many times for different persons when the phrase and code combination is missing from the ACTR database. The coder must report identical write-in responses which occur many times because these could be subject to special coding instructions or could suggest updates to the ACTR data base.

### PF Keys available

- PF1** On-line **HELP**
- PF2** **GO UP** the list of members in a household to display the previous person on the bottom half of the screen
- PF3** **GO DOWN** the list of members in a household to display the next person on the bottom half of the screen
- PF4** **SCROLL TO THE LEFT** the response fields which have < or <> to the right side of each field
- PF5** **SCROLL TO THE RIGHT** the response fields which have a > or <> to the right side of each field
- PF6** Display **MORE** variables about the person who requires coding on supplementary screens
- PF7** **SCROLL UP** the list of phrases and codes returned by ACTR when there is a + sign to the right of the first entry
- PF8** **SCROLL DOWN** the list of phrases and codes returned by ACTR when there is a + sign to the right of the last entry
- PF9** **DEFER** coding of a write-in response to later time. Hit PF9 again to confirm or hit CLR to cancel.
- PF10** **VALIDATE** the code selected or entered for a write-in response by displaying a standard description for a valid code
- PF11** **COMMIT** the code selected or entered for a write-in response
- PF12** **QUIT** and exit the coding screen. Hit PF12 again to confirm or hit CLR to cancel.
- PF17** **RECALL ACTR** list of phrases and codes generated by the Batch jobstream.
- PF18** Display the **CODING HISTORY** of a write-in response.

**PF19** Assign **MULTIPLE** codes or check-boxes to a write-in response for the Language, Citizenship or Ethnic Origin variables.

**PF20** CALL ACTR on-line for an up-to-date list of phrases and codes using new matching parameters.

**PF22** TRANSLATE the standard description of a valid code in the other official language

**PF23** Set a write-in response as **UNABLE TO CODE**. Hit PF23 again to confirm or hit CLR to cancel.

### Expert coding instructions for a write-in response with a list of phrases and codes returned by ACTR which is most current

Upon entry, the screen is displayed for a write-in response to be coded with an ACTR list of phrases and codes. The cursor is positioned on the first line of the "Select" field. No message is displayed on the last line of the screen.

When a list of phrases and codes are returned by ACTR for a write-in response, the Coder has the following coding options:

- to select a code for the write-in response from the ACTR list; or
- to key any other code for the write-in response which is more appropriate than any of the ones displayed in the ACTR list.

The phrases and codes returned by ACTR could be "possible" matches because they all have a score greater than the lower threshold value used by the Batch jobstream to generate the ACTR list. The list of phrases, codes and scores are returned by score.

*When no warning message indicate that the ACTR list may be outdated, the Expert Coder should proceed coding from the ACTR list displayed without calling ACTR on-line. The same ACTR results will be returned if the Coder decides to call ACTR on-line again (PF20) with the **same** matching parameters than those used by the Batch jobstream. If you choose to call ACTR on-line, it is suggested to use matching parameters which are different than those used by the Batch jobstream.*

When you are ready to code the write-in response and you decide to **select a code** from the ACTR list:

1. Press the Tab Forward and Tab Back keys to position the cursor beside the appropriate code in the "Select" field.

*Use the keys PF7 and PF8 to scroll the list of phrases and codes returned by ACTR.*

2. Type **S** in the "Select" field.

3. Press **PF10** to validate the code selected.

*After the **PF10** key has been pressed, the system displays the standard description of the code selected on the message line at the bottom of the screen.*

*At this point the selection can be changed. Repeat steps 1 to 3 until you are satisfied that the code is correct.*

*If there is more than one **S** in the "Select" field, the system keeps the first **S** from the top as the code selected.*

4. Press **PF11** to commit the validated code.

*After the **PF11** key has been pressed, the system displays on the screen the next write-in response to be coded.*

When you are ready to code the write-in response and you decide to **key a code**:

1. Enter a valid code in the "Code" field.

2. Press **PF10** to validate the code.

*After the **PF10** key has been pressed, the system displays the standard description of the code entered on the message at the bottom of the screen.*

*At this point the code can be changed by repeating Steps 1 and 2 until you are satisfied that the code is correct.*

3. Press **PF11** to commit the validated code.

*After the **PF11** key has been pressed, the system displays on the screen the next write-in response to be coded.*

```

EXPERETO      1996 CENSUS OF POPULATION / AUTOMATED CODING      11/09/96
MEXPERT1      EXPERT CODING - ETHNIC ORIGIN                     12:56:19.5

Write-in to be coded                                           Type Code
PAYS DE GALES

Phrases returned by ACTR                                       Score Codes (S)elect
PAYS DE GALLE                                               2.544 004      -

Lower:      0.000  Upper:      0.000  Diff:      0.00  Returns:      0
ID: 32110003 023 0001 16
=====
Data for same question from each household member             Persnr:      1
Check-      :
boxes:

Write-ins: PAYS DE GALES
:
:
:

Enter---PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10---PF11---PF12
HELP UP     DOWN <<<< >>>> MORE +UP +DOWN DEFER VALID COMIT QUIT
    
```

Expert Coding screen after PF10 is pressed for selected code from the ACTR list

```

EXPERETO      1996 CENSUS OF POPULATION / AUTOMATED CODING      11/09/96
MEXPERT1      EXPERT CODING - ETHNIC ORIGIN                     12:56:19.5

Write-in to be coded                                           Type Code
PAYS DE GALES                                               004

Phrases returned by ACTR                                       Score Codes (S)elect
PAYS DE GALLE                                               2.544 004      -

Lower:      0.000  Upper:      0.000  Diff:      0.00  Returns:      0
ID: 32110003 023 0001 16
=====
Data for same question from each household member             Persnr:      1
Check-      :
boxes:
Write-ins: PAYS DE GALES
:
:
:

Enter---PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10---PF11---PF12
HELP UP     DOWN <<<< >>>> MORE +UP +DOWN DEFER VALID COMIT QUIT
WELSH
    
```

## Expert coding instructions for a write-in response with a list of phrases and codes returned by ACTR which may be outdated

Upon entry, the screen is displayed for a write-in response to be coded with an ACTR list of phrases and codes. The cursor is positioned at the lower field on the first line of the "Select" field. A message is displayed on the last line of the screen.

1126 ACTR LIST MAY BE OUTDATED. ACTR BASE WAS MODIFIED.

The phrases and codes returned by ACTR could be "possible" matches because they all have a score greater than the lower threshold value used by the Batch jobstream to generate the ACTR list. However, the ACTR list may be outdated because the ACTR database was modified **after** the ACTR list was generated. As a result, the coder should request a hardcopy list of updates made to the ACTR database in order to verify if any of the possible phrases and codes returned by ACTR are affected by these updates.

When there are good indications that the ACTR list generated for this write-in response is outdated, the Expert Coder could call ACTR on-line (PF20) for a revised up-to-date list of possible phrases and codes. It is recommended to first call ACTR on-line using the same matching parameters which were used by the Batch jobstream to generate the list of "possible" matches.

The coder has the following coding options:

- to select a code for the write-in response from the ACTR list which may be outdated; or
- to key any other code for the write-in response which is more appropriate than any of the ones displayed in the ACTR list:

When you are ready to code the write-in response and you decide to **select a code** from the ACTR list:

1. Press the Tab Forward and Tab Back keys to position the cursor beside the appropriate code in the "Select" field.

*Use the keys PF7 and PF8 to scroll the list of phrases and codes returned by ACTR.*

2. Type **S** in the "Select" field.
3. Press **PF10** to validate the code selected.

*After the PF10 key has been pressed, the system displays the standard description of the code selected on the message line at the bottom of the screen.*

*At this point the selection can be changed. Repeat Steps 1 to 3 until you are satisfied that the code is correct.*

*If there is more than one S in the "Select" field, the system keeps the first S from the top as the code selected.*



4. Press **PF11** to commit the validated code.

*After the **PF11** key has been pressed, the system displays on the screen the next write-in response to be coded.*

When you are ready to code the write-in response and you decide to **key a code**:

1. Enter a valid code on the "Code" field.
2. Press **PF10** to validate the code.

*After the **PF10** key has been pressed, the system displays the standard description of the code entered on the message at the bottom of the screen.*

*At this point the code can be changed by repeating Steps 1 and 2 until you are satisfied that the code is correct.*

3. Press **PF11** to commit the validated code.

*After the **PF11** key has been pressed, the system displays on the screen the next write-in response to be coded.*

Expert Coding screen upon entry with ACTR list which may be outdated

```

EXPERETO          1996 CENSUS OF POPULATION / AUTOMATED CODING          11/09/96
MEXPERT1          EXPERT CODING - ETHNIC ORIGIN                        12:56:19.5
Write-in to be coded                                     Type Code
C.S.S.R. EUROPE
Phrases returned by ACTR                                Score Codes (S)elect
C S S R                                                22.188  046
EUROPE                                                  10.495  083
S AMERICA                                               0.099  220
Lower:      0.000  Upper:      0.000  Diff:      0.00  Returns:  0
ID: 32110003 023 0001 16
=====
Data for same question from each household member          Persnr:      1
Check-      :
boxes:
Write-ins: C.S.S.R. EUROPE
:
:
:
Enter---PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10---PF11---PF12
HELP UP    DOWN <<<< >>>> MORE +UP    +DOWN DEFER VALID COMIT QUIT
I126 ACTR LIST MAY BE OUTDATED. ACTR BASE WAS MODIFIED.
    
```

Expert Coding screen after PF10 is pressed for code selected from the ACTR list which may be outdated

```

EXPERETO          1996 CENSUS OF POPULATION / AUTOMATED CODING          11/09/96
MEXPERT1          EXPERT CODING - ETHNIC ORIGIN                        12:56:19.5
Write-in to be coded                                     Type Code
C.S.S.R. EUROPE                                         046
Phrases returned by ACTR                                Score Codes (S)elect
C S S R                                                22.188  046
EUROPE                                                  10.495  083
S AMERICA                                               0.099  220
Lower:      0.000  Upper:      0.000  Diff:      0.00  Returns:  0
ID: 32110003 023 0001 16
=====
Data for same question from each household member          Persnr:      1
Check-      :
boxes:
Write-ins: C.S.S.R. EUROPE
:
:
:
Enter---PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10---PF11---PF12
HELP UP    DOWN <<<< >>>> MORE +UP    +DOWN DEFER VALID COMIT QUIT
CZECHOSLOVAKIAN
    
```

## Expert coding instructions for a write-in response without list of phrases and codes returned by ACTR

Upon entry, the screen is displayed for a write-in response to be coded with no ACTR list of phrases and codes. The cursor is positioned on the "Code" field. A message is displayed on the last line of the screen.

I026 NO ACTR RESULTS RETURNED BY THE BATCH JOBSTREAM.

There are no ACTR list of phrases and codes displayed on the screen:

- because the write-in response was coded by the system and you are requested to code it independently for Quality Control purposes; or
- because the write-in response was not coded by the system and no phrases were found on the ACTR database with a score greater than the lower threshold value used by the Batch jobstream to generate the ACTR list.

As a result, the Coder must determine the valid code from the reference code book or other sources, or refer coding.

*For a write-in response coded by the system which the Expert Coder is adjudicating for Quality Control, it is not recommended to call ACTR on-line. If the Coder decides to call ACTR on-line, the code returned will be the same as the one assigned by the system during the Batch jobstream.*

*For a write-in response which was not coded by the system, no ACTR results will be returned if the coder decides to call ACTR on-line again with the same matching parameters used by the Batch jobstream. Therefore, the Coder should proceed coding without calling ACTR on-line or call ACTR on-line with different matching parameters than those used by the Batch jobstream.*

When you are ready to code the write-in response:

1. Enter a valid code on the "Code" field.
2. Press PF10 to validate the code.

*After the PF10 key has been pressed, the system displays the standard description of the code entered on the message at the bottom of the screen.*

*At this point the code can be changed by repeating Steps 1 and 2 until you are satisfied that the code is correct.*

3. Press PF11 to commit the validated code.

*After the PF11 key has been pressed, the system displays on the screen the next write-in response to be coded.*

Expert Coding screen after PF10 is pressed for code entered because no ACTR list was returned

```

EXPERETO          1996 CENSUS OF POPULATION / AUTOMATED CODING          18/02/96
MEXPERT1          EXPERT CODING - ETHNIC ORIGIN                        9:12:04.2
Write-in to be coded                                     Type Code
PAKI                                                       123

Phrases returned by ACTR                                     Score Codes (S)elect
Lower:          0.000  Upper:          0.000  Diff:          0.00  Returns:          0
ID: 31112203 113 0001 16
=====
Data for same question from each household member          Persnr:          1
Check-          :
boxes:

Write-ins: PAKI
:
:
:
Enter---PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12
HELP UP DOWN <<<< >>>> MORE +UP +DOWN DEFER VALID COMIT QUIT
PAKISTANI, NOT INCLUDED ELSEWHERE
    
```

Expert Coding screen upon entry with no ACTR list returned

```

EXPERETO          1996 CENSUS OF POPULATION / AUTOMATED CODING          18/02/96
MEXPERT1          EXPERT CODING - ETHNIC ORIGIN                        9:12:04.2
Write-in to be coded                                     Type Code
PAKI                                                       _____

Phrases returned by ACTR                                     Score Codes (S)elect
Lower:          0.000  Upper:          0.000  Diff:          0.00  Returns:          0
ID: 31112203 113 0001 16
=====
Data for same question from each household member          Persnr:          1
Check-          :
boxes:

Write-ins: PAKI
:
:
:
Enter---PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12
HELP UP DOWN <<<< >>>> MORE +UP +DOWN DEFER VALID COMIT QUIT
I130 NO ACTR RESULTS RETURNED BY THE BATCH JOBSTREAM.
    
```

## XVII. Steps for Recoding Rejects

This section provides instructions to the Expert Coder who has selected to do Recoding of Rejects from the Menu of Expert Coding activities. The Coder will review the code assigned by the General Coder to a write-in response. At this point, the Expert Coder decides to keep or modify the code assigned by the General Coder.

Responses to be reviewed belong to a work unit rejected by Quality Control. A work unit is rejected when too many errors are found in its sample after the different levels of independent Quality Control coding. All write-in responses within a rejected work unit are reviewed by an Expert coder excluding those which were referred by General coders and those part of the sample. Recoding of Rejects ensures that work of high quality is accepted and that substandard work is rectified.

*A work unit is a group of write-in responses assigned to a General coder for Interactive Coding and from which a sample is drawn and coded independently again by up to three (3) different coders to control the quality of work of a coder.*

Counts of the number of write-in responses reviewed and recoded are tabulated in order to measure the impact of recoding by Expert coders on the overall quality of coding. The code assigned by the Expert Coder is **final**.

The instructions to recode write-in responses are simple and similar to those of other Expert Coding activities. During Recoding of Rejects, the differences are:

- The code assigned by the General Coder is displayed in the "Code" field for review.
- The name and ID of the General Coder is displayed on the screen.
- The date when the code was assigned is displayed on the screen.
- PF17 to recall ACTR results is not functional.
- PF20 to call ACTR on-line is not functional.
- PF18 to view the coding history is not functional.

## **PF Keys available**

During Recoding of Rejects, the following PF keys are available to the Expert Coder.

- PF1** on-line **HELP**
- PF2** **GO UP** the list of members in a household to display the previous person on the bottom half of the screen
- PF3** **GO DOWN** the list of members in a household to display the next person on the bottom half of the screen
- PF4** **SCROLL TO THE LEFT** the response fields which have < or <> to the right side of each field
- PF5** **SCROLL TO THE RIGHT** the response fields which have a > or <> to the right side of each field
- PF6** Display **MORE** variables about the person who requires coding on supplementary screens
- PF7** **SCROLL UP** the list of phrases and codes returned by ACTR when there is a + sign to the right of the first entry
- PF8** **SCROLL DOWN** the list of phrases and codes returned by ACTR when there is a + sign to the right of the last entry
- PF9** **DEFER** coding of a write-in response to later time. Hit PF9 again to confirm or hit CLR to cancel.
- PF10** **VALIDATE** the code selected or entered for a write-in response by displaying a standard description for a valid code
- PF11** **COMMIT** the code selected or entered for a write-in response
- PF12** **QUIT** and exit the coding screen. Hit PF12 again to confirm or hit CLR to cancel.
- PF19** Assign **MULTIPLE** codes or check-boxes to a write-in response for the Language, Citizenship or Ethnic Origin variables.
- PF22** **TRANSLATE** the standard description of a valid code in the other official language
- PF23** Set a write-in response as **UNABLE TO CODE**. Hit PF23 again to confirm or hit CLR to cancel.

### Instructions for recoding of rejects

Upon entry, the screen is displayed for a write-in response to be reviewed. The cursor is positioned on the "Code" field where the code previously assigned by the General Coder is displayed.

When you are ready to resolve the write-in response:

1. Review the code assigned by the General Coder displayed on the "Code" field.
2. Accept the code displayed as the most appropriate for the write-in response, by leaving it as is or change the code for a new one which is more appropriate for the write-in response, that is, enter a valid code on the "Code" field or type **S** in the "Select" field next to any of the code displayed in the ACTR list.
3. Press **PF10** to validate the code.

*After the **PF10** key has been pressed, the system displays the standard description of the code entered on the message at the bottom of the screen.*

*At this point the code can be changed by repeating Steps 1 and 2 until you are satisfied that the code is correct.*

4. Press **PF11** to commit the validated code.

*After the **PF11** key has been pressed, the system displays on the screen the next write-in response to be coded.*

Recoding of Rejects screen upon entry. Code 196 was assigned by the coder identified below.

```

REJECT1                RECODING OF REJECTS - ETHNIC ORIGIN                10:12:41.1

Write-in to be coded                                     Type   Code
ST CHRIST ISLANDER                                     196
Phrases returned by ACTR                               Score  Codes (S)elect
ST CHRISTOPHER ISLANDER                               2.308   196
ST VINCENT ISLANDER                                   2.308   198
ISLANDIC                                               0.254   032
                                                         - +

Coder-id : 21      Name : ANDREE                PARADIS                30/08/96
ID: 31234121 112 0001 16

-----
Data for same question from each household member      Persnr: 1
Check- :
boxes:

Write-ins: ST CHRIST ISLANDER
:
:
:
Enter--PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12
      HELP UP   DOWN <<<< >>>> MORE +UP +DOWN DEFER VALID COMIT QUIT
    
```

Recoding of Rejects screen after PF10 is pressed to validate code

```

RECODETO                1996 CENSUS OF POPULATION / AUTOMATED CODING      03/09/96
MREJECT1                RECODING OF REJECTS - ETHNIC ORIGIN                10:12:41.1

Write-in to be coded                                     Type   Code
ST CHRIST ISLANDER                                     196
Phrases returned by ACTR                               Score  Codes (S)elect
ST CHRISTOPHER ISLANDER                               2.308   196
ST VINCENT ISLANDER                                   2.308   198
ISLANDIC                                               0.254   032
                                                         - +

Coder-id : 21      Name : ANDREE                PARADIS                30/08/96
ID: 31234121 112 0001 16

-----
Data for same question from each household member      Persnr: 1
Check- :
boxes:

Write-ins: ST CHRIST ISLANDER
:
:
:
Enter--PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12
      HELP UP   DOWN <<<< >>>> MORE +UP +DOWN DEFER VALID COMIT QUIT
      OTHER CARIBBEAN, NOT INCLUDED ELSEWHERE
    
```



**XVIII. Abbreviations for Check-box Responses**

Abbreviations are used to display check-box responses to the following questions on the coding screen and on the supplementary screens.

On supplementary screens	Abbreviations	Descriptions
Relationship to Person 1	PERSON1 HUS/WIF PARTNER SON/DAU S/D LAW GRNDCHI F/M THER F/M LAW GRNDPAR BRO/SIS B/S LAW LOG/BRD ROOM MT	Person 1 Husband or wife of Person 1 Common-law partner of Person 1 Son or daughter of Person 1 Son-in-law or daughter-in-law of Person 1 Grandchild of Person 1 Father or mother of Person 1 Father-in-law or mother-in-law of Person 1 Grandparent of Person 1 Brother or sister of Person 1 Brother-in-law or sister-in-law of Person 1 Lodger or boarder Room-mate

CULTURAL	Abbreviations	Descriptions
Official Languages	ENGLONL FRENONL ENGLFRE NENGFRE	English only French only Both English and French Neither English nor French
Non-official Languages	NONE	None
Home Language	ENGLISH FRENCH	
Mother Tongue	ENGLISH FRENCH	
Place of Birth	1 2 3 4 5 6 7 8 8 B Y N	Newfoundland Prince Edward Island Nova Scotia New Brunswick Québec Ontario Manitoba Saskatchewan Alberta British Columbia Yukon Northwest Territories
Citizenship	CANBRTH CANNAT	Canada, by birth Canada, by naturalization
Population group	WHITE CHINESE S ASIAN BLACK ARAB/WA FILIP. SE ASIA LAT AME JAPAN KOREAN	White Chinese South Asian Black Arab/West Asian Filipino South East Asian Latin American Japanese Korean
Aboriginal Self-Reporting Indian Band	NO N-A IND METIS INUIT	No Yes, North American Indian Yes, Métis Yes, Inuit (Eskimo)

MAJOR FIELD OF STUDY	Abbreviations	Descriptions
Secondary/Elementary education	NEVER	Never attended school or attended kindergarten only
University education	LTONEYR NONE	Less than 1 year (of completed courses) None
Other post-secondary education	LTONEYR NONE	Less than 1 year (of completed courses) None
School attendance	NO YESFULL YESPART	No, did not attend in past eight months Yes, full-time Yes, part-time, day or evening
Diploma, Certificate or Degree	SECSCCE  TRADECE NUNIVCE  UNIVCE  BACHDEG UNABVBA  MASTERS  DEGRMED  DOCTORA  NONE	Secondary (high) school graduation certificate or equivalent Trades certificate or diploma Other non-university certificate or diploma (obtained at community college, CEGEP, technical institute, etc.) University certificate or diploma below bachelor level Bachelor's degree (e.g. B.A., B.Sc., LL.B.) University certificate or diploma above bachelor degree Master's degree(s) (e.g. M.A., M.Sc., M. Ed.) Degree in medicine, dentistry, veterinary medicine or optometry (e.g. M.D., D.D.S., D.M.D., D.V.M., O.D.) Earned doctorate (e.g. Ph.D., .Sc., D.Ed.) No diploma, certificate or degree

MOBILITY	Abbreviations	Descriptions
Inside Canada	SAMADDR SAMP RTE  DIFPRTE	Lived at the same address as now Lived at a different address in the same city, town, village, township, municipality or Indian reserve Lived in a different city, town, village, township, municipality or Indian reserve
Outside Canada	DIFCOUN OUTCANA	Lived outside Canada (1 Year ago) Lived outside Canada (5 Years ago)

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