

Multi-unit (MU) Manager Interview
Questionnaire Content Document for the Enumerator Instrument

2018 Census Test Multiunit Instrument Specification Back Section

Universal Functionality:

- Census Day will be displayed as April 1, 2018 for the purpose of the 2018 Census Test.

Question wording key

Black text = Read by interviewer

Black text = Roster names and you/your references

Blue text = Optional text for interviewer to read

Red text = Interviewer instruction

Help text

The Help Icon will display a message “Help is not available for this question.” when there is no specific help text for a question. Screens are listed in 2016 CT US 16-84.

Off-Path Data

Any roster attributes (persons, demographics, flags, etc.) should be removed from the roster once they are deemed off-path. See US 17-86.

NRFU WHITE LIST

Text boxes in the NRFU instrument should only accept the following characters:

a-z A-Z ñáéíóúüÑÁÉÍÓÚÜ 0-9 [] { } ~ % \$? ¿ # @ ! ; - _ () / : ; " ' . , * + =

Description of Global Options across all screens:

- DK/REF
 - The DK/REF option for screens that have it available exhibit a global behavior and is not readily available on screen as an option. Once DK/REF is available as a response option, selecting either DK (if available) or REF will default the original response options to an unselected or null value. Similarly, with the DK/REF options available on a screen, selecting any of the original options will set the DK/REF response to a null value.
- Exit Survey
 - Upon pressing the Exit Survey icon, a pop-up (not a hard/soft edit) appears asking “Are you sure you want to exit the interview?” with Yes and No response options in the form of buttons. Pressing “Yes” will take the enumerator through one or two additional screens before reaching CASE NOTES, and then back to ACTIVE CASELIST.

The fill for <PARTIAL ADDRESS> will include any address information detailed below that is provided in the original Census address, and should be in the following format depending on the address type:

- For a Street Address or PR General Address (with Address Number and Street Name {and Apt/Unit, if applicable}), the address fill is Address Number and Street Name {and Apt/Unit, if applicable} in all caps (examples: "123 VACATION WAY" or "123 VACATION WAY APT 101").
- For an address that has a physical description, the address fill is the physical description in all caps (example: "THE APARTMENT OVER THE POST OFFICE ON COUNTY ROAD 5")
- For a P.O. Box Number, the address fill is the term "P.O. BOX" (in all caps) followed by the P.O. Box Number (example: "P.O. BOX 123").
- For a Rural Route address (with Rural Route Descriptor, Rural Route number, and RR Box ID number), the address fill is the Rural Route Descriptor and Rural Route number, followed by the term "BOX" (in all caps) and the RR Box ID number (example: "RR 45 BOX 76").
- For a PR Urbanización Address (with Urbanización Name, Address Number and Street Name {and Apt/Unit, if applicable}), the address fill is the Urbanización Name, Address Number and Street Name {and Apt/Unit, if applicable} in all caps (examples: "URB SAN JUAN 123 VACATION WAY" or "URB SAN JUAN 123 VACATION WAY APT 101").
- For a PR Area Name Address (with Area Name 1 {and Area Name 2, if applicable}, Address Number and Street Name {and Apt/Unit, if applicable}), the address fill is the Area Name 1 {and Area Name 2, if applicable}, Address Number and Street Name {and Apt/Unit, if applicable} in all caps (examples: "BO SAN JUAN 123 VACATION WAY" or "BO SAN JUAN 123 VACATION WAY APT 101").
- For a PR Apartment Complex Address (with Name of Condominium or Residencial, Address Number, Street Name and Apt/Unit), the address fill is the Name of Condominium or Residencial, Address Number, Street Name and Apt/Unit in all caps (examples: "COND SAN JUAN 123 VACATION WAY APT 101" or "RES SAN JUAN 123 VACATION WAY APT 101").

Additional Information

Sprint 6 version created from final COMPASS Spec for 2017 Census Test.

Creating a bookmark - *Select desired text* -> insert -> bookmark -> type in desired text in box (no spaces or special characters) -> Add

Inserting a hyperlink bookmark - *Select desired text* -> insert -> hyperlink -> bookmark -> choose existing hyperlink

Please note: the table of contents will ONLY be updated once track changes have been accepted. Due to this, page numbers in the table of contents might not accurately reflect all screen names.

The following step should ONLY occur after track changes have been accepted.

Table of Contents - Highlight page number -> insert -> quickparts -> field -> page reference -> in scroll down list, select corresponding bookmark -> Numeric format: 0 -> Format: 1,2,3 -> click okay.

To update/reflect changes on table of content - Ctrl A -> F9. This will update all page numbers in table of content.

Revision History

Sprint	Date	Change
Sprint 6	11/14/16	Create a new option on the UNABLE TO ATTEMPT screen (18-491). Changing the year 2017 into 2018 (18-492). Create eventcode (18-493). Update NO COMPLETE response options (18-494). Updating PERSONAL NON-CONTACT response options (18-495). Update STRATEGIES previous screens (18-496). Update EXIT POP-STATUS previous screens (18-497). Update UNABLE TO ATTEMPT previous screens (18-498). Update MU INTRO question wording for outbound telephone housing unit (18-499). Update RESP LOCATION response options (18-500). Update DETAILED ORIGIN screens instruction wording (18-501). Update OWNER and RENTER response options (18-502).
Sprint 6	11/21/16	Remove tribal enrollment screens (18-503). Remove tribal enrollment 2 from previous screens on the ELSEWHERE screens (18-504). Remove rev tribal enrollment from previous screens on REVIEW (18-505). Remove the branching to tribal enrollment (18-506). Updating year from 1891 to 1892 (18-507). Update LANGUAGE BARRIER RESP instructional wording (18-508). Update INMOVER DONE question wording (18-509). Update MU ANYONE branching (18-510). Update NO COMPLETE previous screens, response options and special instructions (18-511). Updating PROXY PHONE response options and question wording (18-512). Update for PROXY ADDRESS response options and question wording (18-513). Update CASE NOTES previous screens (18-514). Update GOOD BYE previous screens (18-515). Update RI INTRO branching (18-516). Update CASE NOTES branching (18-517). Update PERSONAL NON CONTACT branching (18-518). Update ACTIVE CASELIST, INACTIVE CASELIST and CASE DETAILS (18-524). Update ATTEMPT TYPE branching for MU RI (18-519). Update ELIGIBLE RESP wording for MU RI (18-520). Update branching to MU ANYONE for MU RI (18-521). Update branching from RI CONTACT RESP for MU RI (18-522). Update VARIABLES SET AFTER CASE NOTES for MU RI (18-523). Add navigation hard edit and special instructions to ATTEMPT TYPE (18-525). Update NO COMPLETE screen branching (18-526). Update LANGUAGE BARRIER previous screens (18-527). Update STRATEGIES question wording (18-528).
Sprint 7	12/19/16	Update BEST TIME instructional text (18-529). Update branching to NO COMPLETE for RI of proxy (18-530). Update RI INTRO branching for proxy (18-531). Update RI VERIFY ADDRESS branching for proxy (18-532). Update BEST TIME for RI of proxy (18-533). Update branching from KNOW ADDRESS for RI of proxy (18-534). Update MU ANYONE question wording (18-535). Update MU INTRO question wording (18-536). Update MU UNABLE TO ATTEMPT question

		<p>wording (18-537). Update soft edits, hard edits, and branching on PEOPLE (18-538). Update POPCOUNT branching (18-539). Update UNDERCOUNT hard edits (18-540). Update ELSEWHERE WHY help text (18-541). Update ELSEWHERE help text (18-542). Update PEOPLE help text (18-543). Update POPCOUNT help text (18-544). Update UNDERCOUNT help text (18-545). Update WHO help text (18-546). Update WHO question wording (18-547). Update RESP NAME hard edits (18-548). Update ROSTER ADD hard edit (18-549). Update ROSTER EDIT hard edit (18-550). Remove NONID_Reinterview from the instrument (18-551). Remove NONID RI INTRO screen (18-552). Update ATTEMPT TYPE branching (18-553). Update DIAL OUTCOME branching and hard edit (18-554). Update NUMBER CALLED previous screens and response options (18-555). Update Relationship-Age check on CONFIRM AGE (18-556). Update REVIEW instructions (18-557). Update STRATEGIES branching (18-558). Update branching for proxy respondent on OWNER screen (18-559). Update DATE OF BIRTH branching (18-560). Update DATE OF BIRTH previous screens (18-561). Update OTHER VACANT response options to fix grammatical errors (18-562). Update predictive text for DETAILED ORIGIN screens (18-563). Update ANYONE to display census address for RI of proxy (18-564). Update EXIT POP-STATUS branching to avoid INMOVER DONE for RI (18-565). Update HOME wording for RI of proxy (18-566). Update OCCUPANCY to display census address for RI of proxy (18-567). Update OWNER to display census address for RI of proxy (18-568). Update PEOPLE wording for telephone RI of proxy (18-569). Update POPCOUNT branching and address display for RI of proxy (18-570). Update RENTER to display census address for RI of proxy (18-571). Update WHO to display Census address for RI of proxy (18-572).</p>
Sprint 7	1/9/17	<p>Update Previous screens and branching on RELATIONSHIP CHECK (18-615). Update RELATIONSHIP OTHER question wording (18-616). Update RELATIONSHIP RESP question wording (18-617). Update RELATION OT question wording (18-618). Update RELATION SD question wording (18-619).</p>
Sprint 8	1/9/17	<p>Update CHANGE RELATION RS OT question wording (18-609). Update AGE screen for new baby flag pathing (18-624). Update CHANGE AGE branching and response options (18-626). Refine help text for MCM screens (18-576). Update help text for RI COUNT (18-577). Expand all help text on DETAILED ORIGIN (18-578). Update HOME help text (18-579). Update RACE help text (18-580). Update SEX help text (18-581). Update DATE OF BIRTH help text (18-582). Update languages in Appendix B (18-583). Update SCAN BARCODE hard edit and special instructions (18-585). Update STRATEGIES question wording for UE (18-586). Update VERIFY DIALED NUMBER branching for UE (18-587). Update OTHER VACANT Ri of proxy wording (18-590). Update</p>

		SPECIFIC UNIT STATUS wording for RI of proxy (18-592). Update VACANT DESCRIPTION wording for RI of proxy (18-593). Update ADDRESS help text (18-594). Update RESP NAME help text (18-595). Update path of proxy eligible cases (18-596). Update CASE DETAILS beginning an interview (18-597). Remove APPOINTMENT DETAILS screen (18-598). Update DISTANCE question wording (18-599). Update ELIGILBE RESP question wording (18-600). Update FIND ADDRESS soft edit (18-601). Update NEW CASE ADDRESS screen (18-602). Update NO COMPLETE screen (18-603). Update for PROXY ADDRESS (18-604). Update PROXY ALERTS screen (18-605). Update PROXY ATTEMPT screen (18-606). Update PROXY LOCATION screen (18-607). Create new screen AGE2 (18-610). Create CHANGE AGE 2 (18-611). Create new screen CONFIRM AGE 2 (18-612). Remove REV BABY FLAG (18-613). Update CHANGE DATE OF BIRTH for updated baby flag pathing (18-614). Update NO COMPLETE previous screens (18-621). Update RACE previous screens (18-622). Update REVIEW screens for new baby flag pathing (18-623). Update BABY FLAG branching and help text (18-625). Update DATE OF BIRTH previous screens (18-627). Update RESP NAME branching (18-584). Update REVIEW branching (18-589). Update RESP PHONE branching (18-591). Update ANYONE screen (18-628). Update ATTEMPT TYPE screen (18-629). Update UNABLE TO ATTEMPT screen (18-631). Update CONTACT HISTORY with proxy required icon (18-638).
Sprint 8	1/11/17	Added note in ELSEWHERE response options. Added note to MAXDISTANCE wording throughout spec.
Sprint 8	1/12/17	Update Census ID formatting (18-634). Update LANGUAGE BARRIER RESP screens (18-635).
Sprint 9	1/25/17	Update UNABLE TO ATTEMPT hard edit (18-641). Add REL-SEX check to the SEX screen (18-642). Update LANGUAGE response options and special instructions (18-573). Standardize hard edits for relationship and sex screens (18-574). Replace empty help text (18-575).
Sprint 9	1/26/17	Update RESP LOCATION screen (18-608). Update ACTIVE CASELIST with Proxy required icon (18-636). Update CASE DETAILS with Proxy required icon (18-637). Update INACTIVE CASELIST with Proxy required icon (18-639). Update Instructional Text on SEX (18-640).
Sprint 9	1/27/17	Define automatic synchronizations (18-643). Update OCCUPANCY help text (18-644). Update branching on RELATIONSHIP CHECK (18-645). Remove PHONE NUMBERS screen (18-646). Removing PHONE NUMBERS from CASE DETAILS screen (18-647). Update CHANGE DATE OF BIRTH branching (18-649). Update Special Instructions on CHANGE RELATION RS SD (18-650).
Sprint 10	2/17/17	CASE NOTES MU (18-632).

Sprint 11	3/13/17	Update NO COMPLETE for noteOrigin variable (18-689). Update REFUSAL REASON for noteOrigin variable (18-690).
Sprint 12	3/20/17	Update special instructions on BEST TIME, CASE NOTES, MU INTRO, and MU UNABLE TO ATTEMPT (18-709). Autofill address on PROXY ADDRESS for MU (18-715).
Sprint 13	4/24/17	Removal of Predictive Text on PROXY ADDRESS, NEW CASE ADDRESS, and PROXY LOCATION (18-717). Update PROXY NAME screen for MU and MU RI (18-719). Update to Case Notes Formatting (18-720).
Sprint 14	5/15/17	MU Update Case Notes Formatting (18-723). Clearing the text box when "Other" is selected as a response option (18-731). List Refusal Reasons for Generated Case Notes (18-733). Update NO COMPLETE response options MU (18-736). Variables after Case Notes for MU Operations PART 1 (18-739). Update previous screens on BEST TIME and CASE NOTES for MU and MU RI (18-744).

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Question Wording choice logic:

These are the variables and logic used to correctly choose what wording should be used for that screen for any given interview. The logic below correctly chooses between the question wording of an “In person housing unit respondent”, “Telephone housing unit respondent”, “In person proxy respondent”, and “Telephone proxy respondent”.

- If ATTACTUAL=PV then the “In Person” question wording should be displayed for any screens following the ATTEMPT TYPE screen with alternate question wording indicated in the Questionnaire Content Document.
- If ATTACTUAL=T then the “Telephone” question wording should be displayed for any screens following the ATTEMPT TYPE screen with alternate question wording indicated in the Questionnaire Content Document.
- If RESP_TYPE=null then the “Housing Unit Respondent” question wording should be displayed.
- If RESP_TYPE=proxy, then the “Proxy Respondent” question wording should be displayed.

Screen name	NO COMPLETE
Previous screen(s) and response option(s)	MU INTRO=Contact made, unable to interview, DK or REF MU ANYONE = Exit or forward navigation, and some or none of the individual housing units have been completed If Exit interview button on toolbar is selected while on screens NUMBER CALLED, DIAL OUTCOME, VERIFY DIALED NUMBER, MU INTRO, MU ANYONE
Response options	If MU: { (Radio buttons) <ul style="list-style-type: none"> o A manager cannot be found at this time o No manager exists to be interviewed o Inconvenient time o Language barrier o Hearing barrier o Refusal by respondent o Other If other selected, display 200-character text box with the label Specify. }
Branching/Skip Patterns	If MU: { <p>A manager cannot be found at this time, go to BEST TIME</p> <p>No manager exists to be interviewed, go to CASE NOTES</p> <p>Inconvenient time, go to BEST TIME</p> <p>Language barrier, go to CASE NOTES</p> <p>Hearing barrier, go to CASE NOTES</p> <p>Refusal by respondent, go to REFUSAL REASON</p> <p>Other, go to CASE NOTES</p>
Data needed	
Help text	Help is not available for this question.
Soft Edit	N/A
Hard Edit	If no option is selected, display “Please provide an answer to the question.” If “Other” is selected and the text box is left blank, display “Please specify the reason that you are unable to conduct this interview.”
Special instructions	A case note is automatically generated when navigating to CASE NOTES. The case note should display on the CASE NOTES screen, formatted as followed: <ul style="list-style-type: none"> • If RESP_TYPE=Proxy <ul style="list-style-type: none"> o User ID o Date and time o MU Manager: <MU NAME ><PARTIAL ADDRESS>(all capitalized) o Fill <MU NAME> with the name of

	<p>the Multi-unit. If no name exists, display 'MU Manager: <PARTIAL ADDRESS>' (all capitalized).</p> <ul style="list-style-type: none"> o NO COMPLETE: <Response option> <Text box input> <p>Set noteOrigin=8</p> <p>Note: Each case note that is generated has the variable <i>noteOrigin</i> associated with it to describe where the case note originated from. Refer to the 'List of Variables' document for a full list of possible values for the variable <i>noteOrigin</i>.</p> <p>Note: When text is entered in a text box, the system shall clear the text box every time the "Other" response option is selected (on both radio buttons and check boxes) instead of displaying the previously entered text.</p>
DK/REF options	Not Available
Exit Survey option	Not Available
Question wording for in person proxy respondent	Thank you for your time. <i>Why are you unable to conduct this interview?</i>
Question wording for telephone proxy respondent	(Same as in person proxy respondent)
User Story Number	16-68, 16-84, 16-99, 16-148, 16-167, 16-177, 16-232, 16-242, 16-243, 16-245, 16-293, 17-116, 17-158, 17-444, 18-494, 18-511, 18-526, 18-530, 18-551, 18-621, 18-603, 18-575, 18-689, 16-723, 18-731, 18-736
Future Suggested Changes	

Screen name	REFUSAL REASON
Previous screen(s) and response option(s)	NO COMPLETE = Refusal by Respondent
Response options	<p>For MU: (Checkboxes)</p> <ul style="list-style-type: none"> <input type="checkbox"/> Respondent too busy / doesn't have time <input type="checkbox"/> Not interested / Does not want to be bothered <input type="checkbox"/> Survey is a waste of taxpayer money <input type="checkbox"/> Done enough other surveys <input type="checkbox"/> Questions legitimacy of questionnaire <input type="checkbox"/> Privacy concerns <input type="checkbox"/> Scheduling difficulties <input type="checkbox"/> Survey is voluntary / Claims does not have to do questionnaire <input type="checkbox"/> Does not understand the questionnaire / Asks questions about the questionnaire <input type="checkbox"/> Anti-government concerns <input type="checkbox"/> Hang-up / Slammed door <input type="checkbox"/> Hostile Resp / dangerous situation / threatened enumerator <input type="checkbox"/> Breaks appointment (puts off enumerator indefinitely) <input type="checkbox"/> Other <p>If "other" selected, display a 200-character text box with the label Specify.</p>
Branching/Skip Patterns	For MU: Go to CASE NOTES
Data needed	N/A
Help text	Help is not available for this question.
Soft Edit	N/A
Hard Edit	For nonresponse, "Please provide an answer to the question." For a response of Other without text in the Specify text box, "Please specify a reason."
Special instructions	<p>A case note is automatically generated when navigating to CASE NOTES. The case note should display on the CASE NOTES screen, formatted as followed:</p> <ul style="list-style-type: none"> • If RESP_TYPE=Proxy <ul style="list-style-type: none"> o User ID o Date and time o MU Manager: <MU NAME ><PARTIAL ADDRESS>(all capitalized) <ul style="list-style-type: none"> ▪ Fill <MU NAME> with the name of the Multi-unit. If no name exists, display 'MU Manager: <PARTIAL ADDRESS>'(all capitalized).

	<ul style="list-style-type: none"> o REFUSAL REASON: <Response option> <ul style="list-style-type: none"> o Developer Note: If multiple response options were selected, then display them in a list format as opposed to a comma separated string. <p>Set noteOrigin=8</p> <p>Note: Each case note that is generated has the variable <i>noteOrigin</i> associated with it to describe where the case note originated from. Refer to the 'List of Variables' document for a full list of possible values for the variable <i>noteOrigin</i>.</p> <p>Note: When text is entered in a text box, the system shall clear the text box every time the “Other” response option is selected (on both radio buttons and check boxes) instead of displaying the previously entered text.</p>
DK/REF options	Not Available
Exit Survey option	Not Available
Question wording for in person proxy respondent	<i>What reasons were given for the refusal, if known?</i>
Question wording for telephone proxy respondent	(Same as in person proxy respondent)
User Story Number	16-68, 16-84, 16-99, 16-147, 16-244, 16-293, 17-436, 18-551, 18-575, 18-690, 18-723, 18-731, 18-733
Future Suggested Changes	

Screen name	PROXY NAME
Previous screen(s) and response option(s)	MU INTRO=Yes
Response options	Name: <ul style="list-style-type: none"> • First Name: 20-character text box • Middle Name: 20-character text box • Last Name(s): 20-character text box
Branching/Skip Patterns	Go to PROXY PHONE
Data needed	N/A
Help text	Help is not available for this question.
Soft Edit	N/A
Hard Edit	For nonresponse: "Please provide an answer to the question." For name fields, if < 3 non-space characters between first and last name: "First and Last Name(s) must have at least 3 characters total. If the respondent is uncomfortable with providing a name, please probe for a nickname."
Special instructions	Pressing Forward Arrow moves the cursor to the next entry field, and does not close the NRFU instrument Keypad.
DK/REF options	Not Available
Exit Survey option	Not Available
Question wording for in person proxy respondent	FOR MU: My first questions are about you, in case I or someone else from the Census Bureau needs to contact you again for additional information. <i>Ask or confirm.</i> What is your name?
Question wording for telephone proxy respondent	(Same as in person proxy respondent)
User Story Number	16-84, 16-167, 16-40, 17-87, 18-575, 18-719
Future Suggested Changes	

Screen name	PROXY PHONE
Previous screen(s) and response option(s)	PROXY NAME
Response options	<p><u>For MU:</u> <u>If ATTEMPT TYPE=Outbound call attempt and RESP TYPE=proxy:</u></p> <ul style="list-style-type: none"> <input type="radio"/> Yes <input type="radio"/> No <p>If no, then the following question should be displayed as well as the text boxes to collect the phone number:</p> <p><i>(Ask or confirm)</i> What is the best business related phone number to reach you? <u>If ATTEMPT TYPE=Personal visit and RESP TYPE=proxy:</u> Phone Number (separate by a hyphen with auto-tabbing)</p> <ul style="list-style-type: none"> <input type="radio"/> Area Code: 3-digit text box <input type="radio"/> Prefix: 3-digit text box <input type="radio"/> Suffix: 4-digit text box
Branching/Skip Patterns	Go to PROXY ADDRESS
Data needed	N/A
Help text	Help is not available for this question.
Soft Edit	N/A
Hard Edit	For nonresponse: "Please provide an answer to the question." If a phone number of less than 10 digits is entered: "The phone number must be in the format (xxx) xxx-xxxx."
Special instructions	<p>Just to clarify, if it is an outbound call then instead of just asking for the best number to reach the proxy respondent question wording should appear the verifies if the number selected in NUMBER CALLED is the best number. If it isn't, then wording appears to solicit and capture the best phone number.</p> <p><u>Prevent adding duplicate phone numbers:</u> When a user adds a new phone number, if that same phone number with PHONEASSOC=Proxy already exists for that case, the system should not add the phone number to the case.</p>
DK/REF options	Available
Exit Survey option	Not Available
Question wording for in person proxy respondent	For MU: What is the best business related phone number to reach you?
Question wording for telephone proxy respondent	For MU: Is <fill with phone number from NUMBER CALLED> the best business related phone number to reach you?
User Story Number	16-84, 17-443, 17-327, 18-512, 18-575
Future Suggested Changes	

Screen name	PROXY ADDRESS
Previous screen(s) and response option(s)	PROXY PHONE
Question wording for in person proxy respondent	<p>For MU: In case we cannot reach you by phone, what is the best business related address or place to find you again?</p> <p>If an address is auto-populated, make updates if necessary.</p>
Question wording for telephone proxy respondent	Same as Question wording for in person proxy respondent.
Response options	<p>If Stateside: { Please select address type: (radio buttons)</p> <ul style="list-style-type: none"> • Street address • P.O. Box • Rural Route <p>(If user selects “Street address” for the Address Type, display the following address collection fields:)</p> <ul style="list-style-type: none"> • Address Number: 20-character text box • Street Name: 100-character text box • Apt/Unit: 52-character text box • City: 40-character text box • State: 20-character text box • ZIP: 5-character text box • Description: 250-character text area • <p>(If user selects “P.O. Box” for the Address Type, display the following address collection fields:)</p> <ul style="list-style-type: none"> • P.O. Box: 10-character text box • City: 40-character text box • State: 20-character text box • ZIP: 5-character text box <p>(If user selects “Rural Route” for the Address Type, display the following address collection fields:)</p> <ul style="list-style-type: none"> • Rural Route Descriptor: drop-down menu with the following options <ul style="list-style-type: none"> o RR o HC o SR o PSC o RTE • Rural Route #: 10-character text box • RR Box ID #: 10-character text box

	<ul style="list-style-type: none"> • City: 40-character text box • State: 20-character text box • ZIP: 5-character text box • Description: 250-character text area <p>**See Special Instructions**</p> <p>}</p> <p>If Puerto Rico:</p> <p>{</p> <p>Please select address type: (radio buttons)</p> <ul style="list-style-type: none"> • General Address • Urbanización Address • Apartment Complex • Area Name Address • P.O. Box • Rural Route <p>(If user selects “General Address” for the Address Type, display the following address collection fields)</p> <ul style="list-style-type: none"> • Address Number: 20-character text box • Street Name: 100-character text box • Apt/Unit: 52-character text box • Municipio: 40-character text box • State: 20-character text box • ZIP: 5-character text box • Description: 250-character text area <p>(If user selects “Urbanización Address” for the Address Type, display the following address collection fields)</p> <ul style="list-style-type: none"> • Urbanización Name: 50-character text box • Address Number: 20-character text box • Street Name: 100-character text box • Apt/Unit: 52-character text box • Municipio: 40-character text box • State: 20-character text box • ZIP: 5-character text box • Description: 250-character text area <p>(If user selects “Apartment Complex” for the Address Type, display the following address collection fields)</p> <ul style="list-style-type: none"> • Name of Condominium or Residencial: 100-character text box • Address Number: 20-character text box • Street Name: 100-character text box • Building Descriptor: (Drop-down menu with the following options:) <ul style="list-style-type: none"> o Edificio o Torre o Unknown or N/A
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	<ul style="list-style-type: none"> • Building ID: 20-character text box • Apt/Unit: 52-character text box • Municipio: 40-character text box • State: 20-character text box • ZIP: 5-character text box • Description: 250-character text area <p>(If user selects “Area Name Address” for the Address Type, display the following address collection fields)</p> <ul style="list-style-type: none"> • Area Name 1: 50-character text box • Area Name 2: 50-character text box • Address Number: 20-character text box • Street Name: 100-character text box • Apt/Unit: 52-character text box • KM/HM: 20-character text box • Municipio: 40-character text box • State: 20-character text box • ZIP: 5-character text box • Description: 250-character text area <p>(If user selects “P.O. Box” for the Address Type, display the following address collection fields)</p> <ul style="list-style-type: none"> • P.O. Box: 10-character text box • Municipio: 40-character text box • State: 20-character text box • ZIP: 5-character text box <p>(If user selects “Rural Route” for the Address Type, display the following address collection fields)</p> <ul style="list-style-type: none"> • Rural Route Descriptor: drop-down menu with the following options <ul style="list-style-type: none"> ○ RR ○ HC ○ SR ○ PSC ○ RTE • Rural Route #: 10-character text box • RR Box ID #: 10-character text box • Municipio: 40-character text box • State: 20-character text box • ZIP: 5-character text box • Description: 250-character text area <p>**See Special Instructions**</p>
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Branching/Skip Patterns	For MU: Go to MU ANYONE
Data needed	<MU Manager Address>
Help text	<p>If Stateside: {</p> <p>Please provide a physical address such as:</p> <ul style="list-style-type: none"> • An address you would give to a shipping company if you wanted a package delivered to your home, or • An address you would provide if you were requesting emergency services such as a 911 call, or • A location description such as “The apartment over the Post Office on County Road 5” or “The brick house with the screened porch on the northeast corner of Main Street and First Avenue”. <p>Please use the following format to enter address information:</p> <ol style="list-style-type: none"> 1. For Street Addresses, such as 5007 N Maple Ave, select the button for Street Address and enter the address into the address fields. <ul style="list-style-type: none"> • Address Number is the numeric identifier from your street address, for example 5007. • Street Name is the name of your street, for example N Maple Ave. • Apt/Unit refers to any unit information that is part of your address, such as an apartment number, unit number, or lot. You will need to enter both the unit type and number. For example, enter “Apt A” or “Lot 3” or “Unit 2-H” or “Room 12”. • Provide a City and State or ZIP code. • Provide any notes about the address in the Description field (not required). 2. For a P.O. Box address, you will need to select the P.O. Box address type (by clicking the button to the left of the P.O. Box label) and enter your address into the P.O. Box address fields. Provide the P.O. Box # along with City and State or ZIP code. <ul style="list-style-type: none"> • • For Rural Route addresses, such as RR 2 BOX 152, select the button for Rural Route and enter the address into the address fields. <ul style="list-style-type: none"> ○ Rural Route Descriptor is the description of the rural route, for example ‘RR’. Rural Route Descriptors include: <ul style="list-style-type: none"> ▪ RR = Rural Route; ▪ HC= Contract Delivery Service Route [formerly Highway Contract Route]; ▪ SR= Star Route; ▪ PSC= Postal Service Center; ▪ RTE= Route) ○ Rural Route # is the numeric identifier from the Rural Route, for example ‘2’. ○ RR Box ID is the numeric identifier from the Rural Route Box, for

	<p>example '152'.</p> <ul style="list-style-type: none"> ○ Provide a City and State or ZIP code ○ Provide any notes about the address in the Description field (not required). <p>}</p> <p>If Puerto Rico:</p> <p>{</p> <p>Please provide a physical address such as:</p> <ul style="list-style-type: none"> • An address you would give to a shipping company if you wanted a package delivered to your home, or • An address you would provide if you were requesting emergency services such as a 911 call, or • A location description such as “The apartment over the Post Office on County Road 5” or “The brick house with the screened porch on the northeast corner of Main Street and First Avenue”. <p>Please use the following format to enter address information:</p> <ul style="list-style-type: none"> • For General Address such as 5007 Maple Ave, select the button for Street Address and enter the address into the address fields. <ul style="list-style-type: none"> ○ Address Number is the numeric identifier from the street address, for example '5007'. ○ Street Name is the name of the street, for example 'Maple Ave'. ○ Apt/Unit refers to any unit information that is part of the address, such as an apartment number, unit number, or lot. You will need to enter both the unit type and number. For example, enter “Apt A” or “Lot 3” or “Unit 2-H” or “Room 12”. ○ Provide a Municipio and State or ZIP code. ○ Provide any notes about the address in the Description field (not required). • For Urbanización Address such as URB Los Olmos 5007 Maple Ave, select the button for Urbanización Address and enter the address into the address fields. <ul style="list-style-type: none"> ○ Urbanización Name is the name of the Urbanización, for example 'Los Olmos'. ○ Address Number is the numeric identifier from the street address, for example '5007'. ○ Street Name is the name of the street, for example Maple Ave. ○ Apt/Unit refers to any unit information that is part of your address, such as an apartment number, unit number, or lot. You will need to enter both the unit type and number. For example, enter “Apt A” or “Lot 3” or “Unit 2-H” or “Room 12”. ○ Provide a Municipio and State or ZIP code. ○ Provide any notes about the address in the Description field (not required). • For Apartment Complex such as Condominium Garden Hills Torre 2 APT 905, 5007 Maple Ave, select the button for Apartment Complex and enter the address into the address fields.
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	<ul style="list-style-type: none"> ○ Name of Condominium or Residencial is the name of the building, for example ‘Condominium Garden Hills’ (‘COND Garden Hills’ is an acceptable response). ○ Address Number is the numeric identifier from your street address, for example ‘5007’. ○ Street Name is the name of your street, for example ‘Maple Ave’. ○ Building Descriptor is the type of building, for example ‘Torre’ ○ Building ID is the identifier associated with the building, for example ‘2’. ○ Apt/Unit refers to any unit information that is part of your address, such as an apartment number, unit number, or lot. You will need to enter both the unit type and number. For example, ‘APT 905’. ○ Provide a Municipio and State or ZIP code. ○ Provide any notes about the address in the Description field (not required). <ul style="list-style-type: none"> ● For Area Name Address such as Barrio Asomante, Sector Los Soles, 5007 Maple Ave, select the button for Area Name Address and enter the address into the address fields. <ul style="list-style-type: none"> ○ Area 1 is the name of the area in which the address is located, and is considered to be an important aspect of the address. For example, ‘Barrio Asomante’ (‘BO Asomante’ is an acceptable response). Some area names include: <ul style="list-style-type: none"> ▪ Barrio (BO) ▪ Sector (SECT) ▪ Comunidad (COM) ▪ Parcelas (PARC) ▪ Bariada (BDA) ▪ Quebrada (QBDA) ○ Area 2 is used if the address has a second area associated with it. For example, ‘Sector Los Soles’. If more than two area names are required to locate a structure, please include that information in the Description field below. ○ Address Number is the numeric identifier from your street address, for example ‘5007’. ○ Street Name is the name of your street, for example ‘Maple Ave’. ○ Apt/Unit refers to any unit information that is part of your address, such as an apartment number, unit number, or lot. You will need to enter both the unit type and number. For example, enter “Apt A” or “Lot 3” or “Unit 2-H” or “Room 12”. ○ KM/HM is the kilometer/hectometer marker associated with the address. You will need to write the marker with the KM on the left side and the HM on the right side. For example, ‘93/1’. ○ Provide a Municipio and State or ZIP code. ○ Provide any notes about the address in the Description field (not required). ● For a P.O. Box addresses, such as P.O. BOX 152, select the button for P.O. Box and enter the address into the address fields <ul style="list-style-type: none"> ○ The P.O. Box is the numeric identifier from the Post Office Box, for example ‘152’.
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	<ul style="list-style-type: none">○ Provide a Municipio and State or ZIP code.● For Rural Route addresses, such as RR 2 BOX 152, select the button for Rural Route and enter the address into the address fields.<ul style="list-style-type: none">○ Rural Route Descriptor is the description of the rural route, for example 'RR'. Rural Route Descriptors include:<ul style="list-style-type: none">▪ RR = Rural Route;▪ HC= Contract Delivery Service Route [formerly Highway Contract Route];▪ SR= Star Route;▪ PSC= Postal Service Center;▪ RTE= Route)○ Rural Route # is the numeric identifier from the Rural Route, for example '2'.○ RR Box ID is the numeric identifier from the Rural Route Box, for example '152'.○ Provide a Municipio and State or ZIP code.○ Provide any notes about the address in the Description field (not required). <p data-bbox="537 850 568 882">}</p>
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Soft Edit	<p>If State \neq "PR" and the provided ZIP is outside of the acceptable range (must be a 5-digit numeric value within the range 01001 – 99950 and other than 11111, 22222, 33333, 55555, 66666, 77777, or 88888) or ZIP length in (1,2,3,4), OR if State = "PR" and the provided ZIP is outside of the acceptable range (must be a 5-digit numeric value within the range 00601 – 00988) or ZIP length in (1,2,3,4): "Please provide a valid ZIP code."</p>
Hard Edit	<p>For nonresponse to Address Type radio buttons, prompt user: "Please select an address type."</p> <p>If Street Address selected, require Address Number, Street Name, and (City + State or Zip) to proceed to next screen.</p> <ul style="list-style-type: none"> • If nonresponse to required fields, prompt user: "Please provide a Street Address." • If nonresponse to just Address Number or Street Name, prompt user: "Please provide an Address Number and Street Name." • If nonresponse to just (City + State or ZIP), prompt user: Please provide a City and State or ZIP code." <p>If P.O. Box selected, require two components to proceed to the next screen: If Stateside: P.O. Box and (City + State or ZIP). If Puerto Rico: P.O. Box and (Municipio + State or ZIP).</p> <ul style="list-style-type: none"> • If nonresponse to both components, prompt user: "Please provide a a P.O. Box address." • If nonresponse to just P.O. Box, prompt user: "Please provide a P.O. Box number." • If Stateside: If nonresponse to just (City + State or ZIP), prompt user: "Please provide a City and State or ZIP code." • If Puerto Rico: If nonresponse to just (Municipio + State or ZIP), prompt user: "Please provide a Municipio and State or ZIP code." • <p>If Rural Route selected, require two components to proceed to the next screen: If stateside: (Rural Route #, RR Box ID #, or Description) and (City+State or Zip). If Puerto Rico: (Rural Route #, RR Box ID #, or Description) and ((Municipio + State or ZIP).</p> <ul style="list-style-type: none"> • If nonresponse to both components, prompt user: "Please provide a Rural Route address." • If nonresponse to just (Rural Route #, RR Box ID #, or Description), prompt user: "Please provide a Rural Route # or RR Box ID #." • If Stateside: If nonresponse to just (City+State or Zip), prompt user: "Please

	<p>provide a City and State or ZIP code.”</p> <ul style="list-style-type: none"> • If Puerto Rico: If nonresponse to just (Municipio + State or ZIP), prompt user: “Please provide a Municipio and State or ZIP code.” • <p>If General Address selected, require Address Number, Street Name, and (Municipio + State or ZIP) to proceed to next screen.</p> <ul style="list-style-type: none"> • If nonresponse to required fields, prompt user: “Please provide a Street Address.” • If nonresponse to just Address Number or Street Name, prompt user: “Please provide an Address Number and Street Name.” • If nonresponse to just (Municipio + State or ZIP), prompt user: Please provide a Municipio and State or ZIP code.” <p>If Urbanización Address selected, require Urbanización Name, Address Number, Street Name, and (Municipio + State or ZIP) to proceed to next screen.</p> <ul style="list-style-type: none"> • If nonresponse to required fields, prompt user: “Please provide a Street Address.” • If nonresponse to just Urbanización Name, prompt user: “Please provide an Urbanización Name.” • If nonresponse to just Address Number or Street Name, prompt user: “Please provide an Address Number and Street Name.” • If nonresponse to just (Municipio + State or ZIP), prompt user: Please provide a Municipio and State or ZIP code.” <p>If Apartment Complex selected, require Apartment Complex Name, Apt/Unit, and (Municipio + State or ZIP) to proceed to next screen.</p> <ul style="list-style-type: none"> • If nonresponse to required fields, prompt user: “Please provide a Street Address.” • If nonresponse to just Apartment Complex Name, prompt user: “Please provide an Apartment Complex Name.” • If nonresponse to just Apt/Unit, prompt user: “Please provide an Apt/Unit.” • If nonresponse to just (Municipio + State or ZIP), prompt user: Please provide a Municipio and State or ZIP code.” <p>If Area Name Address selected, require Area Name 1, and (Municipio + State or ZIP) to proceed to next screen.</p> <ul style="list-style-type: none"> • If nonresponse to required fields, prompt user: “Please provide a Street
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	<p>Address.”</p> <ul style="list-style-type: none"> • If nonresponse to just Area Name 1, prompt user: “Please provide an Area Name.” • If nonresponse to just (Municipio + State or ZIP), prompt user: Please provide a Municipio and State or ZIP code.”
Special instructions	<p>If Puerto Rico, <State> should be auto-filled with “Puerto Rico”</p> <p>If the respondent is a Multi-unit manager (MULTIUNIT=2), then the <COMPLETE MU ADDRESS> will be auto-populated in the appropriate, corresponding fields on PROXY ADDRESS.</p> <p>If the address type selected matches that of the address associated with the case (i.e. Street address is selected when the case has a street style address), then the corresponding fields that are displayed should be autofilled with the existing case address information.</p> <p>When user selects Address Type, only the fields corresponding to that address type should be available to the user.</p> <p>The NRFU instrument output data should include a variable that indicates which Address Type the user selected and any address information that he/she provided for that Address Type.</p>
DK/REF options	Available for Address Type. Not available for address fields that appear after selecting a radio button.
Exit Survey option	Not Available
User Story Number	16-131, 16-198, 17-62, 17-133, 17-136, 17-137, 18-513, 18-604, 18-715, 18-717
Future Suggested Changes	

Screen name	BEST TIME
Previous screen(s) and response option(s)	NO COMPLETE = A manager cannot be found at this time or Inconvenient time
Response options	<p>(Checkboxes)</p> <p><input type="checkbox"/> Anytime</p> <p><input type="checkbox"/> Sunday</p> <p><input type="checkbox"/> Monday</p> <p><input type="checkbox"/> Tuesday</p> <p><input type="checkbox"/> Wednesday</p> <p><input type="checkbox"/> Thursday</p> <p><input type="checkbox"/> Friday</p> <p><input type="checkbox"/> Saturday</p> <p>(As each day is selected, the list of times below will be displayed as an expanded list)</p> <p><input type="checkbox"/> Morning</p> <p><input type="checkbox"/> Afternoon</p> <p><input type="checkbox"/> Evening</p> <p>When a day is checked, the default will be that all times (Morning, Afternoon, and Evening) are selected with the ability to unselect times that are not needed.</p> <p>When “Anytime” is selected all days are expanded with all times and days checked. If one time or day is unselected, then “Anytime” is unchecked.</p>
Branching/Skip Patterns	If MU (MULTIUNIT=2): Go to CASE NOTES
Data needed	<MU NAME>
Help text	Help is not available for this question.
Soft Edit	N/A
Hard Edit	For nonresponse: “Please provide an answer to the question.”
Special instructions	<p>If a day is selected, automatically select all times for that day. Allow for the ability to uncheck times when necessary.</p> <p>If “Anytime” is selected, select all days and times.</p> <p>Fill <MU NAME> with the name of the Multi-unit. If no name exists, fill <MU NAME> with <PARTIAL ADDRESS>.</p>
DK/REF options	Available
Exit Survey option	Not Available

Question wording for in person proxy respondent	<p>For MU If NO COMPLETE=Inconvenient time: Someone from the Census Bureau may contact you to complete the full interview. What are the best days and times to contact you again? <i>Check all that apply.</i></p> <p>If NO COMPLETE = Eligible respondent not available: What are the best days and times to talk with someone who can tell me the occupancy status of the units at <MU NAME>? <i>Check all that apply.</i></p> <p>Else: Another Census employee may contact you to evaluate my work. What are the best days and times to contact you? <i>Check all that apply.</i></p>
Question wording for telephone proxy respondent	(Same as in person proxy respondent)
User Story Number	16-84, 16-231, 16-275, 16-289, 16-293, 17-283, 17-440, 18-529, 18-533, 18-551, 18-575, 18-709, 18-744
Future Suggested Changes	

Screen name	GOOD BYE
Previous screen(s) and response option(s)	VERIFY DIALED NUMBER=No, DK and RF MU ANYONE= Forward navigation, and all of the individual housing units have been completed MU INTRO= No
Response options	
Branching/Skip Patterns	If MU: Go to CASE NOTES.
Data needed	N/A
Help text	Help is not available for this question.
Soft Edit	N/A
Hard Edit	N/A
Special instructions	N/A
DK/REF options	Not Available
Exit Survey option	Not Available
Question wording for in person proxy respondent	That completes the interview. Thank you for your time and cooperation.
Question wording for telephone proxy respondent	(Same as in person proxy respondent)
User Story Number	16-84, 16-99, 16-177, 16-254, 16-280, 17-329, 18-515, 18-575
Future Suggested Changes	

Screen name	CASE NOTES
Previous screen(s) and response option(s)	<p>ATTEMPT TYPE=(Cancel attempt) DIAL OUTCOME≠(Someone answers or Exit Survey) NO COMPLETE=(A manager cannot be found at this time, Language barrier, Hearing barrier, or Other) REFUSAL REASON BEST TIME GOOD BYE MU INTRO=(No one answers) MU UNABLE TO ATTEMPT</p>
Response options	A large Text Box that allows as many characters that make sense for the screen []
Branching/Skip Patterns	go to ACTIVE CASELIST
Data needed	<p>Any notes for that case Case notes from previous MU attempts <MU NAME> <PARTIAL ADDRESS></p>
Help text	Help is not available for this question.
Soft Edit	At the end of the attempt display: “This is the last screen for this attempt. Swipe again to exit the case and return to the case list.”
Hard Edit	N/A
Special instructions	<ul style="list-style-type: none"> • A black/white ‘Warning triangle’ icon should be displayed to the left of the textbox. The icon should be able to be toggled to red/white to signify the case note is a safety concern or an access code. <ul style="list-style-type: none"> ○ If the user adds the note with the ‘Warning triangle’ icon toggled to red/white, then the note should display with the red/white ‘Warning triangle’ icon to the left of the note. ○ If the user adds the note with the black/white ‘Warning triangle’, then the note should display without any icon. ○ If the user adds the note with the ‘Warning triangle’ toggled to red/white, set WARNING=1. Otherwise, set WARNING=0. • User can select “+ Add” button (below text box) after entering a note in the field to have the note added to the case. <ul style="list-style-type: none"> ○ When forward navigation from the screen occurs (that is, with a swipe forward/or click on the Next button) if there is a note still in the text box, it is automatically added to the case. • Any case notes entered throughout the instrument should be populated in the text box when the screen is accessed. <ul style="list-style-type: none"> ○ Response on REFUSAL REASON <ul style="list-style-type: none"> ▪ Formatted: <ul style="list-style-type: none"> • User ID • Date and time • MU Manager: <MU NAME > <PARTIAL ADDRESS> (all capitalized) ○ Fill <MU NAME> with the name of the Multi-unit. If no name exists, display ‘MU Manager: <PARTIAL

	<p>ADDRESS>'(all capitalized).</p> <ul style="list-style-type: none"> • REFUSAL REASON: <Response option> <ul style="list-style-type: none"> o Developer Note: If multiple response options were selected, then display them in a list format as opposed to a comma separated string. o Response on NO COMPLETE <ul style="list-style-type: none"> ▪ Formatted: <ul style="list-style-type: none"> • User ID • Date and time • MU Manager: <MU NAME ><PARTIAL ADDRESS>(all capitalized) <ul style="list-style-type: none"> o Fill <MU NAME> with the name of the Multi-unit. If no name exists, display 'MU Manager: <PARTIAL ADDRESS>'(all capitalized). • NO COMPLETE: <Response option> <Text box input> <p><i>Added case notes have the following info displayed:</i></p> <ul style="list-style-type: none"> • (If the case note was made at a Parent MU case (MULTIUNIT=2)) <ul style="list-style-type: none"> o User ID o Date and time o MU Manager: <MU NAME ><PARTIAL ADDRESS>(all capitalized) <ul style="list-style-type: none"> ▪ Fill <MU NAME> with the name of the Multi-unit. If no name exists, fill <MU NAME> with <PARTIAL ADDRESS>. o Note <p>Note: MU=2 refers to the parent case (operation: MU). MU=1 refers to the children cases that make up the parent case (operation: NRFU).</p> <p>The case notes entered for a MU=2 (Parent) case will remain on CASE NOTES during future contact attempts.</p> <p>The case notes entered for a MU=2 (Parent) case will remain on CASE NOTES for each MU=1 (Child) case.</p> <p>The 'Important' case notes entered for a MU=2 (Parent) case will remain on CASE NOTES for a MU=1 (Child) Reinterview (RI) case, however, this will be an OCS requirement.</p> <p>Upon swiping past the soft edit, the system attempts a sync, sending all case information to OCS.</p>
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DK/REF options	Not Available
Exit Survey option	Not Available
Question wording for in person proxy respondent	<i>Enter any notes about the case in the text box.</i>
Question wording for telephone proxy respondent	(Same as in person proxy respondent)
User Story Number	16-84, 16-99, 16-123, 16-157, 16-167, 16-196, 17-7, 17-70, 17-122, 17-134, 17-139, 17-280, 18-514, 18-517, 18-575, 18-643, 18-632, 18-709, 18-720, 18-723, 18-733, 18-744
Future Suggested Changes	

Screen name	MU INTRO
Previous screen(s) and response option(s)	ATTEMPT TYPE
Response options	(Radio buttons) <ul style="list-style-type: none"> • Yes • No • No one answers • Contact made, unable to interview
Branching/Skip Patterns	If Yes, go to PROXY NAME. If No, go to GOOD BYE. If No one answers, go to CASE NOTES. If Contact made, unable to interview, go to NO COMPLETE. If DK/REF, go to NO COMPLETE. If Exit Survey is selected, go to NO COMPLETE
Data needed	<MU NAME>
Help text	Help is not available for this question.
Soft Edit	N/A
Hard Edit	For nonresponse, “Please provide an answer to the question.”
Special instructions	Fill <MU NAME> with the name of the Multi-unit. If no name exists, fill <MU NAME> with <PARTIAL ADDRESS>.
DK/REF options	Available
Exit Survey option	Available
Question wording for in person proxy respondent	Hello, I’m (your name) from the U.S. Census Bureau. <i>(Show ID).</i> I’m here to collect information for some of the units at <MU NAME>. The interview should take about 10 minutes. <i>(Hand respondent Information Sheet and point to Confidentiality Notice.)</i> This notice explains that your answers are confidential. Is this <MU NAME>?
Question wording for telephone proxy respondent	Hello, I’m (your name) from the U.S. Census Bureau. I need to speak with someone who can tell me the occupancy status of the units at <MU NAME>. The interview should take about 10 minutes. This survey is authorized by Title 13 of the United States Code and your response is required by law. Our approval number from the Office of Management and Budget is xxxx-xxxx. All of the information that you provide will remain confidential. Is this <MU NAME>?
User Story Number	16-167, 16-240, 16-274, 17-84, 17-444, 17-479, 18-499, 18-536, 18-575, 18-709
Future Suggested Changes	

Screen name	MU ANYONE
Previous screen(s) and response option(s)	PROXY ADDRESS
Response options	(Radio buttons) <ul style="list-style-type: none"> • Occupied • Vacant • Other
Branching/Skip Patterns	If forward navigation, and all of the individual housing units have been completed, go to GOOD BYE. If Exit Survey or forward navigation, and some or none of the individual housing units have been completed, go to NO COMPLETE.
Data needed	Address of individual housing unit within the combined multi-unit. <Census Day> Case IDs.
Help text	<p>A housing unit may be an apartment, a group of rooms, or a single room that:</p> <ul style="list-style-type: none"> • Can be occupied as separate living quarters in which the occupants live separately from any other individuals in the building • Has separate and direct access from outside the building or through a common hall <p>For each unit in the multi-unit, select whether it is Occupied, Vacant, or Other.</p> <p>Occupied: A housing unit is classified as occupied if it is the usual place of residence of the person or group of people living in it on census day, or if the occupants are away on vacation or a business trip</p> <p>Vacant: A housing unit is vacant if no one is living in it on census day. Units occupied on census day entirely by persons who have a usual home elsewhere (UHE) are considered to be temporarily occupied, and are classified as “vacant.” UHE is defined as the place where a person lives and sleeps most of the time. The census defines everyone as having only one usual residence.</p> <p>New units not yet occupied are classified as vacant housing units if construction has reached a point where all exterior windows and doors are installed and final usable floors are in place.</p> <p>For each unit specified as Vacant, further classify it as one of the following:</p> <ul style="list-style-type: none"> • For Rent – A unit is offered “for rent,” or it is offered either “for rent” or “for sale.” • Rented, Not Occupied – A unit is rented but not yet occupied, including where money has been paid or agreed upon, but the renter has not yet moved in. • For Sale Only – A unit is offered “for sale only,” including units in cooperatives and condominium projects if the individual units are offered “for sale only.” If units are offered either “for rent” or “for sale” they are included in the “for rent” classification. • Sold, Not Occupied – A unit is sold but not yet occupied, including units

	<p>that have been sold recently, but the new owner has not yet moved in.</p> <ul style="list-style-type: none"> • For Seasonal, Recreational, or Occasional Use – A unit is used or intended for use only in certain seasons or for weekends or other occasional use throughout the year. Interval ownership units, sometimes called shared-ownership or time-sharing condominiums, also are included here. • For Migrant Workers – A unit is intended for occupancy by migratory workers employed in farm work during the crop season. • Other – The vacant unit does not fall into any of the categories specified above. For example, units held for occupancy by a caretaker or janitor, and units held for personal reasons of the owner. <p>For each unit specified as Other, further classify it as one of the following:</p> <ul style="list-style-type: none"> • Does not exist – A unit does not exist at all. • Demolished – A unit is about to be demolished. • Burned out – A unit is burned out and uninhabitable. • Nonresidential – No one lives in the unit and it is not used as living quarters (for example, a business or commercial facility). • Uninhabitable – A unit is open to the elements, condemned, or under construction. • Missing unit designation – A unit does not have a designation within the multi-unit address. • Duplicate – A unit occurs twice in the Case list. • Other – A unit is not livable and does not fall into any of the categories specified above.
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Soft Edit	For forward navigation when some but not all the cases are resolved: “Someone from the Census Bureau may return to ask about the status of some of the remaining units.”
Hard Edit	N/A
Special instructions	<p>If a user scrolls down on MU ANYONE screen, the titles Address Name, Occupied, Vacant, and Other should be frozen on the screen so the user can always see them.</p> <p>When the “Vacant” response option for a unit is selected, the following Vacant Description question with response options displays:</p> <p>Why was the unit vacant on <CENSUS DAY>?</p> <p>(Radio buttons)</p> <ul style="list-style-type: none"> <input type="radio"/> For rent <input type="radio"/> Rented, not occupied <input type="radio"/> For sale only <input type="radio"/> Sold, not occupied <input type="radio"/> For seasonal, recreational, or occasional use <input type="radio"/> For migrant workers <input type="radio"/> Other <p>When the “Other” response option for a unit is selected, the following status question with response options displays:</p> <p>Why was the unit not a housing unit on <CENSUS DAY>?</p> <p>(Radio buttons)</p> <ul style="list-style-type: none"> <input type="radio"/> Does not exist <input type="radio"/> Demolished/burned out <input type="radio"/> Nonresidential <input type="radio"/> Uninhabitable <input type="radio"/> Missing unit designation <input type="radio"/> Duplicate <input type="radio"/> Other <p>.</p>
DK/REF options	N/A
Exit Survey option	Available
Question wording for in person proxy respondent	<p>Now I’m going to ask you to verify the status of some of the units on <CensusDay>. Were the following units occupied or vacant on <CensusDay>?</p> <p>(Note: the following sentence should display in red font)</p> <p><i>Read each address and if necessary probe for response on whether it is occupied or vacant.</i></p>
Question wording for	

telephone proxy respondent	Same as in person proxy respondent
User Story Number	16-177, 16-211, 16-212, 16-213, 16-238, 17-90, 17-479, 18-510, 18-521, 18-535
Future Suggested Changes	In Special instructions, remove “If an address=Vacant or Other, move the address to Inactive Caselist screen. If an address = Occupied, move the address to the ACTIVE CASELIST screen. Else, move the address to the ACTIVE CASELIST screen” because the appropriate HUs will be assigned by OCS the following day.

Screen name	MU UNABLE TO ATTEMPT
Previous screen(s) and response option(s)	ATTEMPT TYPE= Unable to attempt
Response options	(Radio buttons) <input type="radio"/> A manager cannot be found at this time <input type="radio"/> No manager exists to be interviewed
Branching/Skip Patterns	Go to CASE NOTES.
Data needed	MU name
Help text	Help is not available for this question.
Soft Edit	N/A
Hard Edit	For nonresponse, "Please provide an answer to the question."
Special instructions	Fill <MU NAME> with the name of the Multi-unit. If no name exists, fill <MU NAME> with <PARTIAL ADDRESS>.
DK/REF options	Not Available
Exit Survey option	Not Available
Question wording for in person proxy respondent	<i>Why are you unable to contact a manager for <MU name>?</i>
Question wording for telephone proxy respondent	(Same as in person proxy respondent)
User Story Number	16-177, 17-436, 18-537, 18-575, 18-709
Future Suggested Changes	

VARIABLES SET AFTER CASE NOTES for MU Operations		
VARIABLE	DESCRIPTION	LOGIC
EVENTCODE	A code given to each attempt at a case to describe the event that occurred	<p>If MU=2 (Parent Case): { If (MU ANYONE=Status determined for all children cases and ONPATH=1), set EVENTCODE=1.021 (Complete by Proxy)</p> <p>If (ATTEMPT TYPE=Cancel attempt and ONPATH=1), set EVENTCODE=3.020 (Not attempted)</p> <p>If (MU UNABLE TO ATTEMPT=A manager cannot be found at this time and ONPATH=1), set EVENTCODE=4.014 (Non-contact Manager not present)</p> <p>If (MU UNABLE TO ATTEMPT=No manager exists to be interviewed and ONPATH=1), set EVENTCODE=4.013 (Non-contact Manager)</p> <p>If (ATTACTUAL=T) and Sufficient response was not obtained, set EVENTCODE=4.011 (Non-contact telephone)</p> <p>If (INTRO=No and ONPATH=1), set EVENTCODE=3.020 (Not attempted)</p> <p>If (INTRO=No one answers and ONPATH=1), set EVENTCODE=3.021 (Non-contact)</p> <p>IF ELSE: If (NO COMPLETE=Language barrier and ONPATH=1) and status IS NOT determined for all children cases, set EVENTCODE=3.062 (Language barrier) If (NO COMPLETE=Hearing barrier and ONPATH=1) and status IS NOT determined for all children cases, set EVENTCODE=3.063 (Hearing barrier) If (NO COMPLETE=Inconvenient time or Eligible respondent not available, and ONPATH=1) & (BEST TIME≠DK or REF, and</p>

		<p>ONPATH=1) & status is NOT determined for all children cases, set EVENTCODE=3.021 (Non-contact)</p> <p>If (NO COMPLETE=Inconvenient time or Eligible respondent not available, and ONPATH=1) & (BEST TIME=DK or REF, and ONPATH=1) & status is NOT determined for all children cases, set EVENTCODE=3.001 (Refusal)</p> <p>If (REFUSAL REASON≠ Hostile Resp/Dangerous situation/Threatened enumerator and ONPATH=1) and status IS NOT determined for all children cases, set EVENTCODE=3.001 (Refusal)</p> <p>If (REFUSAL REASON= Hostile Resp/Dangerous situation/Threatened enumerator and ONPATH=1) and status IS NOT determined for all children cases, set EVENTCODE=4.031 (Dangerous Address)</p> <p>If (NO COMPLETE=Other and ONPATH=1), set EVENTCODE=3.050 (Other eligible)</p> <p>IF ELSE: Set EVENTCODE=1.041 (Partial insufficient by Proxy) }</p> <p>IF MU=1 (Child Case): {</p> <p>If MU ANYONE=Occupied and ONPATH=1, set EVENTCODE=3.025 (Occupied by Manager Visit)</p> <p>If MU ANYONE=Vacant and ONPATH=1, set EVENTCODE=5.049 (Vacant by Manager Visit)</p> <p>If MU ANYONE=Other and ONPATH=1, set EVENTCODE=5.063 (Delete by Manager Visit)</p> <p>IF ELSE: Set EVENTCODE=4.091 (Unknown eligibility by Manager Visit)</p>
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STATUSCODE	<p>A code given to the case after it has been attempted based on the EVENTCODE to describe the status of the case.</p> <p>(Possibilities include: C (Complete), A (Attempted), LH (Language/Hearing barrier), RF (Refusal), or DS (Dangerous Situation))</p>	<p>Initialize STATUSCODE=Null</p> <p>If EVENTCODE=1.021 (Complete by Proxy), then STATUSCODE=C (Complete)</p> <p>If EVENTCODE=3.062 (Language barrier), 3.063 (Hearing barrier), then STATUSCODE=LH (Language/Hearing barrier)</p> <p>If EVENTCODE=3.001 (Refusal), then STATUSCODE=RF (Refusal)</p> <p>If EVENTCODE=4.031 (Dangerous address), then STATUSCODE=DS (Dangerous situation)</p> <p>If EVENTCODE=4.014 (Non-contact Manager not present), 4.013 (Non-contact Manager), 3.021 (Non-contact), then STATUSCODE=A (Attempted)</p> <p>If EVENTCODE=1.041 (Insufficient partial by Proxy), 3.020 (Not attempted), 4.011 (Non-contact telephone), then either (STATUSCODE=null and case should return to the ACTIVE CASELIST) or (if reopened, the case will continue to have the STATUSCODE from the most recent attempt and should remain in the INACTIVE CASELIST).</p>

MU Manager Visit: Field Attempt DAY 1				
NRFU Description	EVENNT CODE	STATUS CODE	Case Disposition	OCS Action to Take Place
Complete by Proxy	1.021	C	Complete	All children cases have been given a status; case is eligible for MU RI
Insufficient Partial by Proxy	1.041		Open	Reassign (Note: does not count as an attempt day)
Refusal	3.001	R	Closed, unresolved	Send ALL children cases to the optimizer for assignment
Not attempted	3.020		Open	Reassign (Note: does not count as an attempt day)
Non-contact Personal	3.021	A	Open	Reassign
Other eligible	3.050	A	Closed, unresolved	Send ALL children cases to the optimizer for assignment (Note: "Other" on NO COMPLETE)
Language Barrier	3.062	LH	Closed, unresolved	Send ALL children cases to the optimizer for assignment
Hearing Barrier	3.063	LH	Closed, unresolved	Send ALL children cases to the optimizer for assignment
Non-contact Telephone	4.011		Open	Reassign (Note: does not count as an attempt day)
Non-contact Manager nonexistent	4.013	C	Closed, unresolved	Send ALL children cases to the optimizer for assignment
Non-contact Manager not present	4.014	A	Open	Reassign
Dangerous address	4.031	DS	Open	Send to Manager Review

MU Manager Visit: Field Attempt DAY 2				
NRFU Description	EVEN CODE	STATUS CODE	Case Disposition	OCS Action to Take Place
Complete by Proxy	1.021	C	Complete	All children cases have been given a status; case is eligible for MU RI
Insufficient Partial by Proxy	1.041		Open	Reassign (Note: does not count as an attempt day)
Refusal	3.001	R	Closed, unresolved	Send ALL children cases to the optimizer for assignment
Not attempted	3.020		Open	Reassign (Note: does not count as an attempt day)
Non-contact Personal	3.021	A	Closed, unresolved	Send ALL children cases to the optimizer for assignment
Other eligible	3.050	A	Closed, unresolved	Send ALL children cases to the optimizer for assignment (Note: "Other" on NO COMPLETE)
Language Barrier	3.062	LH	Closed, unresolved	Send ALL children cases to the optimizer for assignment
Hearing Barrier	3.063	LH	Closed, unresolved	Send ALL children cases to the optimizer for assignment
Non-contact Telephone	4.011		Open	Reassign (Note: does not count as an attempt day)
Non-contact Manager nonexistent	4.013	C	Closed, unresolved	Send ALL children cases to the optimizer for assignment
Non-contact Manager not present	4.014	A	Closed, unresolved	Send ALL children cases to the optimizer for assignment
Dangerous address	4.031	DS	Open	Send to Manager Review

MU Manager Visit: Children Cases given MU=2 EVENTCODE=1.021 (Complete)				
NRFU Descripti on	EVE NT COD E	STAT US COD E	Case Disposit ion	OCS Action to Take Place
Occupied by MV	3.025		Open	If no MU RI, case disposition for MU=1 is 'Open' and should be assigned.
Unknown Eligibility by MV	4.091		Open	If no MU RI, case disposition for MU=1 is 'Open' and should be assigned.
Vacant by MV	5.049		Open	If no MU RI, case disposition for MU=1 is 'Vacant' and should be removed.
Delete by MV	5.063		Open	If no MU RI, case disposition for MU=1 is 'Delete' and should be removed.