

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

## 2018 Census Test Multiunit Instrument Specification Front Section

App Icons for Field Data Collection (US 18-667):

- For Production: FDC
- For Training: Training FDC

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.

For screens that contain actual help text, there will be instructional text at the very top with the following wording: *If the help text is collapsed, click on the > to view help text associated with each section.(18-648).*

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
  - o 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
  - o 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").

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

<b>Sprint</b>	<b>Date</b>	<b>Change</b>
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 wording (18-537). Update soft edits, hard edits, and branching on PEOPLE (18-538). Update POPCOUNT branching (18-539). Update

		<p>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 SPECIFIC UNIT STATUS wording for RI of proxy (18-592). Update VACANT DESCRIPTION wording for RI of proxy (18-593). Update</p>

		<p>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).</p>
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 Poxy 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	Update Case Details, Contact History, Address Details, and Case Notes (18-671). Update count of cases (18-673). Update help text for ecase (18-648).
Sprint	3/10/17	Remove MCM screens. Change Enumeration app icon (18-667).

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Sprint 14	5/15/17	Clearing the text box when "Other" is selected as a response option (18-731). Change UTC to GMT (18-732).

## Question Index

Screen name	Screen Owner	Previous Questions that an action on a question leads to this screen	Next Questions that follows this question based on an action	Page Number
ATTEMPT TYPE	WARD KAY (NRFUDO)	CASE DETAILS	CASE NOTES NUMBER CALLED MU INTRO MU UNABLE TO ATTEMPT	9
NUMBER CALLED	WARD KAY (NRFUDO)	DIAL OUTCOME	DIAL OUTCOME	11
DIAL OUTCOME	WARD KAY (NRFUDO)	NUMBER CALLED	VERIFY DIALED NUMBER CASE NOTES NUMBER CALLED NO COMPLETE	13
VERIFY DIALED NUMBER	WARD KAY (NRFUDO)	DIAL OUTCOME	MU INTRO GOOD BYE	15

### 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	<b>ATTEMPT TYPE</b>
Previous screen(s) and response option(s)	CASE DETAILS = Begin Interview
Question wording for in person housing unit respondent	If MU: <i>Describe this attempt to contact a manager for &lt;MU name&gt;.</i>
Response options	If MU: (Radio buttons) <ul style="list-style-type: none"> <li><input type="radio"/> Personal visit</li> <li><input type="radio"/> Outbound call attempt</li> <li><input type="radio"/> Unable to attempt</li> <li><input type="radio"/> Cancel attempt</li> </ul>
Branching/Skip Patterns	If MU: If ATTEMPT TYPE = Personal visit, go to MU INTRO. If ATTEMPT TYPE = Outbound call attempt, go to NUMBER CALLED. If ATTEMPT TYPE = Unable to attempt, go to MU UNABLE TO ATTEMPT. Else If ATTEMPT TYPE=Cancel attempt, go to CASE NOTES.
Data needed	Full Census Address. 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."  If backwards navigation occurs on this screen, display: "Already at beginning of survey."
Special instructions	If "Cancel attempt" is selected, then the number of attempts for the case should not change after swiping past CASE NOTES.  If MU: { Fill <MU NAME> with the name of the Multi-unit. If no name exists, fill <MU NAME> with <PARTIAL ADDRESS>.  Fill priority for <PARTIAL ADDRESS>: City Style address; if none then fill with Non-city style address; if none then fill with physical description.  If "Personal visit", then set ATTACTUAL=P.V. If "Outbound call attempt", then set ATTACTUAL=T.  When swiping to the next screen, DATEOFCONTACT is set, which is a GMT timestamp of the current time.  Set RESP_TYPE= Proxy. }
DK/REF options	Not Available
Exit Survey option	Not Available
Question wording for	

Screen name	<b>ATTEMPT TYPE</b>
telephone housing unit respondent	(Same as in person housing unit respondent)
Question wording for in person proxy respondent	(Same as in person housing unit respondent)
Question wording for telephone proxy respondent	(Same as in person housing unit respondent)
User Story Number	16-86, 16-139, 16-R141, 16-179, 16-243, 17-102, 17-281, 17-436, 17-481, 18-519, 18-525, 18-553, 18-629, 18-575 18-732
Future Suggested Changes	

Screen name	<b>NUMBER CALLED</b>
Previous screen(s) and response option(s)	ATTEMPT TYPE (if ATTEMPT TYPE=Outbound call attempt for MU) DIAL OUTCOME (if there are additional phone numbers associated with the case where PHONEASSOC and RESP_TYPE are equal, or when the first occurrence of either 'New number from recording' or 'Number not dialed/Number misdialled' is selected).
Response options	Radio buttons: <ul style="list-style-type: none"> <li>• &lt;options for each phone number &gt;</li> <li>• Add Number</li> </ul> <p>Note: If MU: RESP_TYPE should already be set to Proxy and PHONEASSOC should set to Proxy.</p>
Branching/Skip Patterns	Go to DIAL OUTCOME. If Exit Survey is selected, go to NO COMPLETE
Data needed	Phone numbers
Help text	Help is not available for this question.
Soft Edit	N/A
Hard Edit	If user selects PREV, then display "New attempt has already started." For nonresponse or if "Add Number" is selected without a phone number entered in the number field, "Please provide an answer to the question." For a phone number that is less than 10 digits:"The phone number must be in the format (xxx) xxx-xxxx."
Special instructions	Next to each number should be a visual indicator as to the previous outcome of that phone number (if there is one), "thumbs up" icon for a good number ( <b>if PHONECAT=G</b> ) and "thumbs down" icon for a bad one ( <b>if PHONECAT not=G</b> ).  There should be a visual indicator for each number as to whether that number has already been attempted during the bundled contact.  <u>Prevent adding duplicate phone numbers:</u> When a user adds a new phone number with PHONEASSOC=Proxy and swipes to the next screen, if that same phone number with PHONEASSOC=Proxy already exists for that case, the system should not add the phone number to the case.  Do not update RESP_TYPE if MU
DK/REF options	Not Available
Exit Survey option	Available
Question wording for in	N/A

Screen name	<b>NUMBER CALLED</b>
person proxy respondent	
Question wording for telephone proxy respondent	<i>What number are you attempting to call?</i>
User Story Number	16-84, 16-153, 16-287, 17-443, 18-555, 18-575
Future Suggested Changes	

Screen name	<b>DIAL OUTCOME</b>
Previous screen(s) and response option(s)	NUMBER CALLED
Response options	<p>If MU: (Radio buttons)</p> <ul style="list-style-type: none"> <li><input type="radio"/> Someone answers</li> <li><input type="radio"/> Ring no answer</li> <li><input type="radio"/> Answering machine/service –no message left</li> <li><input type="radio"/> New number from recording</li> <li><input type="radio"/> Normal busy/circuits busy</li> <li><input type="radio"/> Fast or WATTS/FTS busy</li> <li><input type="radio"/> Fax machine reached, no message sent</li> <li><input type="radio"/> Number could not be completed as dialed</li> <li><input type="radio"/> No signal or funny signal</li> <li><input type="radio"/> Number not in service</li> <li><input type="radio"/> Number changed, no new number given</li> <li><input type="radio"/> Bad connection</li> <li><input type="radio"/> Temporarily not in service</li> <li><input type="radio"/> TDD or TTY reached</li> <li><input type="radio"/> Number not dialed/number misdialed</li> <li><input type="radio"/> Other noncontact</li> </ul> <p>If Other noncontact selected, display a write-in field with the label <i>Specify</i>.</p>
Branching/Skip Patterns	<p>If MU: If Someone answers, go to VERIFY DIALED NUMBER Else, if there are additional phone numbers associated with the case where PHONEASSOC and RESP_TYPE are equal (or for first occurrence of either New number from recording or Number not dialed/number misdialed), go to NUMBER CALLED Else, go to CASE NOTES If Exit Survey is selected, go to NO COMPLETE</p>
Data needed	Phone number from NUMBER CALLED CASE ID
Help text	Help is not available for this question.
Soft Edit	N/A
Hard Edit	<p>For nonresponse, “Please provide an answer to the question.”</p> <p>If “Other noncontact” is selected and the text box is left blank, display “Please specify the noncontact reason.”</p> <p>If an enumerator tries to swipe backwards (or select previous) on this screen, then display the following message: “Please provide a dial outcome for the phone number. You cannot go backwards to change the phone number but may do so on the next screen if either “Number not dialed/number misdialed” or “New number</p>

Screen name	<b>DIAL OUTCOME</b>
	from recording” is the selected dial outcome.”
Special instructions	<p>For MU: Write in fields should be 200 characters in length.</p> <p>If DIAL OUTCOME=Someone Answers, set PHONECAT=G for the phone number selected on NUMBER CALLED.</p> <p>If DIAL OUTCOME=(Ring no answer, Answering machine/service – no message left, New number from recording, Normal busy/circuits busy, Fast or WATTS/FTS busy, Fax machine reached, no message sent, No signal or funny signal, Bad connection, Temporarily not in service, TDD or TTY reached, Other noncontact), set PHONECAT=I for the phone number selected on NUMBER CALLED.</p> <p>If DIAL OUTCOME=(Number could not be completed as dialed, Number not in service, Number changed, no new number given, Number not dialed/number misdialled, New number from recording), set PHONECAT=B for the phone number selected on NUMBER CALLED.</p> <p>Note: When text is entered in a text box, the system shall clear the text box every time the “Other noncontact” 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	Available
Question wording for in person proxy respondent	N/A
Question wording for telephone proxy respondent	<i>What was the result of placing the call to &lt;phone number selected from NUMBER CALLED&gt;?</i>
User Story Number	16-210, 16-243, 17-103, 17-282, 17-436, 17-480, 17-482, 18-554, 18-634, 18-575, 18-731
Future Suggested Changes	

Screen name	<b>VERIFY DIALED NUMBER</b>
Previous screen(s) and response option(s)	<b>DIAL OUTCOME=Someone Answers</b>
Response options	(Radio buttons) <input type="radio"/> Yes <input type="radio"/> No
Branching/Skip Patterns	If MU: If Yes go to MU INTRO If No, DK, REF go to GOOD BYE If Exit Survey is selected, go to NO COMPLETE
Data needed	Phone number selected in NUMBER CALLED
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	N/A
DK/REF options	Available
Exit Survey option	Available
Question wording for in person proxy respondent	N/A
Question wording for telephone proxy respondent	Hello. My name is <i>(your name)</i> and I am from the U.S. Census Bureau. Have I reached <i>&lt;insert phone number selected from NUMBER CALLED&gt;?</i>
User Story Number	16-84, 17-151, 17-436, 18-551, 18-587, 18-575
Future Suggested Changes	