MATCHING PROCEDURES MANUAL

1999 Senegal Recensement Général de la Population et d'Habitat

Direction de la Prévision et de la Statistique
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CHAPTER 1 - Introduction

The Senegal Recensement of Population and Housing Post-Enumeration Survey (EPC) is aimed at evaluating the completeness of coverage and the quality of information that will be collected in the 1999 Recensement of Population and Housing. In order to achieve these objectives, the EPC has three major phases: (a) The EPC Data Collection Operation, (b) Matching Operation, and (c) Field Reconciliation Operation.

1.1 The Three Phases of the EPC

The **EPC Data Collection Operation** will be undertaken four weeks after the end of the data collection for the recensement in the urban and rural areas of the country. All private households in 100 sample DRs will be re-canvassed and re-enumerated. Selected basic items from the recensement will be asked during the EPC, and the same methods of obtaining and recording responses to these items will be utilized. Some questions will be asked in detail to reveal whether the original intent of the question was understood. Questions that are aimed at identifying the mover status of each household and person in the EPC sample DR will also be asked.

The **Matching Operation** involves the matching of the data collected in the Post-Enumeration Survey with the corresponding recensement data. The recensement households and persons will be matched with those enumerated in the EPC for the same geographic area. Following the criteria for household-level matching, "apparié" and "not matched" households will be determined. Person-to-person matching will be carried out for persons of "apparié" households only.

The **Reconciliation Operation** involves visite de conciliations to sample segments upon completion of the matching operation. During the Visite de conciliation, it is necessary to determine whether households and persons enumerated in the Recensement but not in the EPC had been correctly or erroneously enumerated in the Recensement and to resolve the final match status for "Possible appariement" cases.

The number of sample DRs that will be assigned to one interviewer will depend on the extent of follow-up cases in each DR and the distance or travel time between DRs. Likewise, the ratio of supervisors to enumerators will be based on the distance or travel time between DRs.

This manual has been prepared to guide matching personnel and field workers of the Reconciliation Operation in the performance of their respective functions and responsibilities. In this manual, the term 1999 Senegal Recensement of Population and Housing and "recensement" will be used interchangeably.

1.2 Transmittal of Questionnaires de l'EPC and Materials to the Field

The following materials should be transmitted to the Superviseur au Terrains at the beginning of the EPC sample survey:

1. EPC Listing Sheets and Questionnaires
2. Sketch maps/block maps
After a quick inventory of all EPC materials, the Superviseur au Terrain should transmit the appropriate DR materials to their Enumerators to perform the EPC survey. In transmitting the materials, the DPS should be guided by the following:

1. Pack a sufficient number of Questionnaires de l'EPC/Listing Sheets and the appropriate DR sketch map in each Enumerator's bag. You should then place the Enumerator's bags in boxes such that the Superviseur au Terrain can quickly inventory and distribute the Enumerator bags upon receipt. All other materials, reports, manuals and ID cards should be placed in a separate box, if possible.

2. Label the boxes indicating the point of delivery (name of area), name of Superviseur au Terrain, and contents. Number the boxes systematically, e.g., Box 1 of 2 boxes; Box 2 of 2 boxes.

3. Prepare two (2) copies of EPC (Transmittal/Receipt of Field Materials) specifying all materials to be submitted to the Superviseur au Terrain. The duplicate copy will be signed and returned to EPC Coordinator upon receipt of the transmittal by the Superviseur au Terrain.

1.3 General Instructions for Enumeration

A Enquête Post-Censitaire (EPC) is an independent enumeration of sample DRs that were enumerated in the recensement. Therefore, EPC Enumerators and Superviseur au Terrains should not be assigned DRs that they covered during the recensement. The field operations will be very similar to the recensement, however only a limited set of variables will be collected during the EPC. Quality control is very important during the EPC so the Enumerators should have their questionnaires carefully reviewed by the Superviseur au Terrain while they are still in the field.

The EPC enumerator should be instructed to use a clean map of the sample DR and to list in the EPC listing sheet all households enumerated in the DR. On the DR map, the cartographer should have indicated the location of important buildings and landmarks. For households near the boundary of the DR the cartographer should have indicated the house number and the street name, if any, or the name of the household head to avoid any DR boundary confusion.

The Enumerators and Superviseur au Terrains should receive training on how to complete the Questionnaires de l'EPC, and how to complete Questionnaires de l'EPC during les visite de conciliations.
CHAPTER 2 - Guidelines for Matching

This chapter discusses the procedures for matching, and provides the rules and guidelines to be followed by the matching personnel who are the following:

(a) Agents d'Appariement
(b) Contrôleurs de l'Appariement
(c) Superviseurs d'Appariement

The objective of the matching operation is to match the households and persons within an DR that was canvassed during the Post-Enumeration Survey (EPC) with the data collected during the Recensement in that same DR. The names of the persons are used to help determine the matching status as well as the characteristic details that were collected such as Age, Sexe, etc. The population within a household may have changed between the recensement enumeration and the EPC enumeration. The changes that may occur are:

(a) **NON-MIGRANT** - a person is considered a "non-migrant" if he/she was a usual resident of the household during the recensement and EPC.

(b) **ARRIVANT** - a person is considered an "arrivant" if he/she became a usual resident of the household after the recensement reference night.

(c) **NÉ APRÈS** - a person is considered to be "né après" if he/she was born after the recensement reference night.

(d) **PARTANT** - a person is considered an "partant" if he/she moved out of the household after the recensement reference night.

The following are the general tasks in matching the results of the EPC with the Recensement:

(a) Determine the DR (or DRs) to be searched.

(b) Search the questionnaires du recensement for household(s) within the specified DR (or DRs), and match to corresponding EPC households.

(c) Determine which of the listed persons in the EPC are matched on the questionnaire du recensement for each matched household.

### 2.1 Determining the DR (or DRs) to be Searched

The matching procedure is generally simple and straightforward. The search for corresponding questionnaires du recensement will begin in a EPC DR and sometimes continue to surrounding DRs if there are boundary problems. A two-way matching will be carried out between the households and persons enumerated in the Recensement and the EPC so that both recensement omissions and erroneous enumerations can be measured.
First, it is necessary to identify the recensement forms for households located within the boundaries of the EPC DR. Each Agent d'Appariement will independently conduct the matching with the aid of DR maps, Recensement list of households, sketch map of the DR, and EPC list of households (EPC listing sheet).

Before the recensement enumeration, the geographic assistants drew a sketch map for each DR. The recensement enumerator was also required to list in the recensement listing sheet every household enumerated in the DR. The serial number and address of each household and the serial number of the building where the household resides are among the types of information that should have been indicated on this form.

The EPC enumerator was instructed to use the map of the sample DR and to list in the EPC listing sheet all households enumerated in the DR. On the DR map, the cartographer should have indicated the location of important buildings and landmarks. For households near the boundary of the DR he/she should have indicated the house number and the street name, if any, or the name of the household head.

The first step in matching should be to match the EPC household serial number of each household with the recensement Household Serial Number listed on the recensement listing sheet, since this will facilitate the matching. Of course, it is necessary to verify the consistency of the recensement and EPC data.

The Agents d'Appariement will compare the EPC DR map with the recensement DR map and the recensement listing sheet with the EPC listing sheet. Using these maps and household listings, they will identify which among the households enumerated in the DR by the recensement enumerator have corresponding Questionnaires de l'EPC.

Once identified, completed questionnaires du recensement for these households will be retrieved for matching. For an entire sample DR, all questionnaires du recensement from the sample DRs should be matched with the corresponding Questionnaires de l'EPC from the same DR.

The Agents d'Appariement will extend their search to an adjacent DR for any unmatched EPC households, except for those that moved into the EPC address after the recensement day ("arrivants"). Responses to the question in column 10, page 3 of the Questionnaire de l'EPC, are particularly useful in this search, since it informs the Agent d'Appariement whether the household members were usual residents at the time of the recensement enumeration.

2.2 Appariement des Ménages

In the coverage evaluation procedure, matching is a vital key to success or failure. The whole matching operation should be carefully monitored; otherwise, unsatisfactory results can quickly defeat the whole coverage program.

Matching a EPC household with corresponding recensement households requires comparing and matching on the following items:

(a) Information d'Identification ou Localité
(b) Noms du Chef du Ménage
(c) Noms des personnes dans le ménage
A household is "apparié" if it satisfies all of the following conditions, namely:

1. The name of the Chef du Ménage in the EPC is the same as the name of the Chef du Ménage in the recensement form except for minor spelling differences that do not change the sound.

2. The persons within the household are the same or at least one of the person names is the same except for minor spelling differences that do not change the sound.

The category "apparié" includes the following situations.

   (a) One EPC household matched to 1 recensement household
   (b) One EPC household matched to 2 or more recensement households
   (c) Two or more EPC households matched to 1 recensement household

The households enumerated in an DR usually appear more or less consecutively on the recensement listing form; thus, once one household is matched, it is easier to match the remaining households, since they may have been canvassed in the same order during the EPC. Therefore, it is desirable to search for all the households in an DR together and place the Questionnaire de l'EPC with the questionnaire du recensement or in some order that will make the subsequent matching steps easier.

The matched EPC households provide "confirmation" for each other. That is, agreement on distinctive characteristics for one household provides confirmation that the other households may also be a match. Matches for a number of the households in an DR provide evidence that the DR was correctly enumerated during the recensement and "non-apparié" households are not matched because they were missed in the recensement enumeration.

2.3 Appariement des Personnes

Once the household has been located on the recensement listing form, the matching of "non-migrant" and "partant" persons on the corresponding questionnaire du recensement can be done within each matched household. Persons within matched households will be matched based on a specified set of criteria. Only people who were usual residents (absent or present, the de jure population) will be matched. Information on visitors will be disregarded. The information components which will be available for use in the matching include:

   (a) Information d'Identification/Description de la localité
   (b) Prénoms et Noms
   (c) Statut de Résidence
   (d) Lien de Parenté avec le CM
   (e) Sexe
   (f) Date de Naissance
   (g) Age
   (h) Ethnie
   (i) Etat Matrimonial.

Lien de Parenté avec le CM, Ethnie, and Etat Matrimonial may or may not be determining items. If they are the same, this fact may contribute to a sure match.
When matching, it is important to make certain that one searches the questionnaire du recensement for all persons in a household who might have been reported as the Chef du Ménage in the recensement. For example, in a household containing a married son, his children, and his father, the recensement might report the father as the household head while the EPC might consider the son as the household head.

It is expected that most cases will be clearly matched or clearly omitted in the recensement. The cases that do not fit either category will be reviewed since these cases will greatly affect the results of the evaluation.

Minor errors in reporting identifying characteristics (Information d'Identification, Prénom et Nom, Age, Sexe, and Etat Matrimonial) are common. If all available identification is used and exact agreement is required, the number of erroneous non-matches will be large. It is, therefore, necessary to provide tolerances; for example, minor differences in spelling of Noms or localities, or differences of less than a year or two in âge would be ignored.

As the tolerance increases or the number of characteristics used for matching decreases, the number of erroneous non-matches will decrease and the number of correct matches will increase. However, the rate at which these changes occur and the optimum characteristics and tolerances will vary from country to country and should be determined specifically for Sénégal through testing in the Pilot EPC before adopting the final matching rules.

It is desirable for matching rules to be explicitly stated and recorded so that persons who do the matching do not apply different criteria. However, to avoid adopting overly rigid rules, a sample of matches and non-matches should be professionally reviewed so that changes and exceptions in the matching rules can be made where appropriate. For example, for an adult, an âge difference of 3 to 5 years may be permitted; whereas for a child the tolerance may be only 1 year. The analyst will review the results of tests on matching and provide guidelines for the Agents d'Appariement. However, the minimum set of criteria necessary to conclude a "match" should contain the following variables: Prénom et Nom (or variations of the same Nom), Lien de Parenté avec le CM (accounting for possible changes of Chef du Menage), Sexe and Age (within tolerance limits).

An example of âge tolerance limits is:

<table>
<thead>
<tr>
<th>Age</th>
<th>Tolerance</th>
</tr>
</thead>
<tbody>
<tr>
<td>under 10</td>
<td>-2 to 2 years</td>
</tr>
<tr>
<td>10 - 19</td>
<td>-3 to +3 years</td>
</tr>
<tr>
<td>20 - 39</td>
<td>-5 to +5 years</td>
</tr>
<tr>
<td>40 - 59</td>
<td>-7 to +7 years</td>
</tr>
<tr>
<td>60 +</td>
<td>-10 to +10 years</td>
</tr>
</tbody>
</table>

Agents d'Appariement will classify each person into one of the following initial person matching status categories on the Questionnaire de l'EPC (page 3, column 12 and page 4, column 7):

(a) **APPARIÉ**: a person is considered a "apparié" if enough person data information is found in agreement with the person data listed on the questionnaire du recensement to ensure a match.
(b) **POSSIBLE APPARIEMENT** - a person is considered a "possible appariement" if they have similar person data characteristics but verification of some of the information is needed to ensure that they "apparié" the person data listed on the questionnaire du recensement.

(c) **NON-APPARIÉ** - a person is considered a "non-apparié" if there is person data listed on either the EPC or the questionnaire du recensement in a matched household without corresponding person data on the other questionnaire. This situation will require a visite de conciliation to clarify the final matching status of this person.

(d) **ARRIVANT** - a person is considered an "arrivant" if they moved into the household after the recensement reference night.

(e) **NON-APPLICABLE** - a person is considered "non-applicable" if a person is born after the recensement reference night.

### 2.4 Instructions for Agents d'Appariement

(a) Each Agent d'Appariement will be assigned an average of two DRs per day.

(b) The Agents d'Appariement will use a blue pen when writing on these forms (except where noted that a pencil should be used).

(c) For each sample DR, the Agent d'Appariement will obtain the recensement listing sheets and questionnaires du recensement for the same DR and for adjacent DRs. Only "non-migrants" (section 10) and "partants" (section 11) will be used to determine a matched household. ("Arrivants" and persons born after the recensement are "non-applicable" for matching).

(d) The Agent d'Appariement will begin by matching the name of the Chef du Menage in the EPC listing sheet to the corresponding name in the recensement listing sheet for that same DR. Then the Agent d'Appariement will pull the two questionnaires with the same name for the Chef du Menage.

(e) The Agent d'Appariement will compare the entries for the recensement and Questionnaires de l'EPC to determine whether the area identification (Section 1) and Chef du Menage information are consistent. Once it is determined that these households match, the Agent d'Appariement will place the Questionnaire de l'EPC with the questionnaire du recensement.

(f) The Agent d'Appariement should then look at the recensement and EPC listing sheets to determine a pattern in the listing which may help in matching the households. The Agent d'Appariement should check for the household in the recensement listing sheet following the previous match, to determine whether the same listing sequence was used for the recensement and EPC. Sometimes it is possible to find a sequential group of matched questionnaires. Continue in this manner to determine all the obvious matches of EPC and recensement households.
(g) If a sequential group of Chef du Menage names cannot be found on the EPC and recensement listing sheets, then the Agent d'Appariement must search for matching Chef du Menage names on the listing sheets and pull the corresponding questionnaires for verification on an individual basis.

(h) Continue in this manner until all the obvious cases have been matched. Then the Agent d'Appariement should pull the unmatched Questionnaires de l'EPC and using Information d'Identification ou de la Localité and name of the Chef du Menage, try to match them to corresponding questionnaires du recensement.

(i) At this point, there may remain a pile of unmatched questionnaires de l'EPC et questionnaires du recensement for that DR. If none of the remaining Chefs du Ménage match, then look at the section on members of the household on the questionnaire du recensement, to determine whether any more names can be matched to the Chefs du Ménage in the Questionnaire de l'EPC (for a particular household, it is possible that the Chef du Menage identified for the EPC is different from the Chef du Menage listed in the recensement). Remember to look for cases where one EPC household matches two or more recensement households and vice-versa.

(j) Following the completion of the previous step, search the recensement listing sheets of adjacent DRs for households corresponding to unmatched EPC households (the enumerators may have put households in different DRs if the DR boundaries were not clear). Attempt to match any remaining Questionnaires de l'EPC to questionnaires du recensement in adjacent DRs, using the steps outlined above.

(k) If a Questionnaire de l'EPC matches a questionnaire du recensement from an adjacent DR, the Agent d'Appariement should write on the "commentaire" section of the front page of the Questionnaire de l'EPC the phrase "MATCHES A QUESTIONNAIRE DU RECENSEMENT OF AN ADJACENT DR".

(l) If any unmatched questionnaires du recensement remain, the Agent d'Appariement should fill out a new Questionnaire de l'EPC and complete the identification items on the first page with the recensement information including the household serial number (item 14). The Agent d'Appariement will also transcribe all the person data from the questionnaire du recensement to the "Dénombre dans le Recensement mais pas dans l'EPC" section of the Questionnaire de l'EPC (pages 6 and 7), and fill in the reconciliation information on the front page (items 33 and box 2 on 34).

(m) If any unmatched Questionnaires de l'EPC remain, they need to be sent back to the field for a visite de conciliation. Therefore, the Agent d'Appariement should fill in the reconciliation information on the front page (items 33 and box 1 in 34) and write "Questionnaire de l'EPC with no matching questionnaire du recensement" in the comments section.

(n) Now the Agent d'Appariement starts the person-to-person matching.
The Agent d'Appariement should take the first set of matched questionnaires de l'EPC et du recensement and transcribe the recensement person data in the shaded areas next to the corresponding person data on the Questionnaire de l'EPC. (Remember to look in both sections 10 and 11 on the Questionnaire de l'EPC).

For each person for whom there is corresponding data, the Agent d'Appariement must complete the "Statut de Déplacement" (page 3, column 10) and "Statut d'Appariement" (Page 3, column 12 and page 4, column 7) in pencil. "Matched Cases" will include those with a Matching Status of "apparié". A questionnaire is considered finished when every person in it has a matching status of "apparié", "non-apparié", "arrivant", or "non-applicable". The finished questionnaires are placed in the matched households pile. If there are enumerator notes, those should also be transcribed. It is of the utmost importance to be very careful in transcribing the recensement data into the Questionnaire de l'EPC so as not to introduce error. This could invalidate the matching done since the Contrôleur de l'Appariement might conclude a different match status with an incorrectly transcribed data item.

The Agent d'Appariement may also find that some persons are "possible-matches" (persons for whom characteristics are similar but need verification) which need to be sent back to the field for a visite de conciliation. For these persons, the Agent d'Appariement should mark the appropriate Statut de Déplacement and Matching Status in pencil and must complete the reconciliation information on the front page (items 33 and box 1 of 34) and write "Person number __ is a "possible appariement".

If the Agent d'Appariement finds that there is a person listed on the questionnaire du recensement but not on the Questionnaire de l'EPC (excluding visitors on the recensement and persons "né après" in the EPC), they need to send the Questionnaire de l'EPC back to the field for a visite de conciliation. Therefore, the Agent d'Appariement should transcribe in pencil that recensement person-data on pages 6 and 7 of the Questionnaire de l'EPC and fill in the reconciliation information on the front-page (items 33 and box 2 in 34).

If the Agent d'Appariement finds that there is a person listed on the Questionnaire de l'EPC that is not on the questionnaire du recensement (excluding persons "né après" or "arrivant" in column 10), they need to send the Questionnaire de l'EPC back to the field for a visite de conciliation. Therefore, the Agent d'Appariement should fill in the reconciliation information on the front page (items 33 and box 1 in 34) and write "Person number __ enumerated in EPC but not in recensement" in the comments section. **DO NOT FILL OUT ANY OTHER INFORMATION FOR THIS PERSON.**

Upon completion of the matching of persons, the Agent d'Appariement will write his/her name and the date of matching on the spaces provided on Page 1, Section 9, Item 28 of each Questionnaire de l'EPC.

The Agent d'Appariement should have the questionnaires for each DR ordered sequentially by EPC household serial number and in three separate piles (matched
households, those "Dénombre dans le Recensement mais pas dans l'EPC ", and any
containing "possible appariement"), to facilitate the review after the matching. The
recensement and Questionnaires de l'EPC for each DR should be passed to the Contrôleur
de l'Appariement upon completion.

2.5 Instructions pour les Contrôleurs de l'Appariement

In the next phase, the Contrôleur de l'Appariement will assist in the matching process by examining the
match conclusions of the Agent d'Appariement. The Contrôleur de l'Appariement must ensure that the
Agents d'Appariement have correctly followed the set of criteria for person-to-person matching.

1. Each pair of Agents d'Appariement will have one Contrôleur de l'Appariement. The Contrôleur de
l'Appariement makes the final decision of the match status in the Questionnaire de l'EPC and
should use a red pen to write on these forms.

2. The Contrôleur de l'Appariement will have three piles of questionnaires from the Agent
d'Appariement to review. One containing "possible appariements", one for "Dénombre dans le
Recensement mais pas dans l'EPC", and the last with matched households.

3. The Contrôleur de l'Appariement should first look at the matched households. He should verify the
work of the Agent d'Appariement, using the questionnaire du recensement to verify the
transcription of data, and the Moving and Matching Status for each person. Verification of
"appariés" is carried out by the Contrôleur de l'Appariement as a quality control activity, in order to
determine whether they are properly classified or not.

4. The Contrôleur de l'Appariement should enter in the "Statut d'Appariement" in column 12 on page
3 and column 7 on page 4 of the Questionnaire de l'EPC with the appropriate code for the final
match status of each person. One of the following codes will be checked if no follow-up visit is
required for that household: "apparié", "non-apparié", "arrivant", or "non-applicable".

5. The Contrôleur de l'Appariement should then look at the Questionnaires de l'EPC for "Enumerated
in Recensement but not in EPC" to verify that the recensement person data has been transcribed
accurately and completely. The Contrôleur de l'Appariement will need to complete instructions on
the visite de conciliation on page 5 of the Questionnaire de l'EPC.

6. The Contrôleur de l'Appariement should then look at the questionnaires containing "possible
appariements". The Contrôleur de l'Appariement needs to review the Agent d'Appariement's
conclusions on "Possible appariement" cases by comparing the recensement and EPC data items in
the Questionnaire de l'EPC. If the Contrôleur de l'Appariement agrees with the "Possible
appariement" assigned by the Agent d'Appariement, then the Questionnaire de l'EPC should be sent
to the field for the visite de conciliation. The Contrôleur de l'Appariement will have to complete
instructions on the visite de conciliation on page 5 of the Questionnaire de l'EPC, including any
specific questions that need to be answered before a final match status can be assigned.
7. If there are more people listed on the Questionnaire de l'EPC than on the corresponding questionnaire du recensement for a "Possible appariement", the Contrôleur de l'Appariement should send the questionnaire to the field for a visite de conciliation.

If the Contrôleur de l'Appariement does not come to the same conclusion, then there are two alternative solutions:

a. If the Contrôleur de l'Appariement concludes that it is a "apparié" then he/she marks the final match status as a "apparié" and no further action is required.

b. If the Contrôleur de l'Appariement concludes that the "Possible appariement" is actually a "non-apparié" then he/she draws a line through the recensement data that was entered and no further action is required.

8. After reviewing each Questionnaire de l'EPC, the Contrôleur de l'Appariement will write his/her name and date of review on the cover page portion of Questionnaire de l'EPC marked "Operational Control", in Section 9, Item 31.

2.6 Instructions pour les Superviseurs d'Appariement

1. One Superviseur d'Appariement will be assigned to each group of Contrôleur de l'Appariements to supervise the matching operation and will use green ink when writing on EPC matching forms.

2. Any problem that may arise in the matching operation should be brought à l'attention du Superviseur d'Appariement.

3. The Superviseur d'Appariement will report problems he/she could not handle to the EPC Coordinator who will be overseeing the matching operation.

4. The Superviseur d'Appariement will assist the Contrôleur de l'Appariement in determining which cases are to be included in the field visite de conciliation.

5. The Superviseur d'Appariement will properly instruct the Contrôleur de l'Appariements to complete the instructions for the Visite de conciliation.

6. The Superviseur d'Appariement will monitor the progress of the work of Agents d'Appariement and Contrôleurs de l'Appariement under his/her supervision. The Superviseur d'Appariement will check the daily output rate of each Agent d'Appariement and Contrôleur de l'Appariement by regularly scrutinizing the records of the day-to-day accomplishment of the Agents d'Appariement and Contrôleurs de l'Appariement, respectively. The daily output rate should be increasing during the first days of matching. The Superviseur d'Appariement should seek for plausible reason/s in case this pattern is not observed.

7. The Superviseur d'Appariement should also be watchful of the general tendency among Agents d'Appariement to become less compliant with the matching rules towards the end of the matching period. An increasing proportion of persons classified as "non-apparié" is a good indication of this
pattern. If this occurs, the Superviseur d'Appariement should scrutinize the "non-apparié" persons in the questionnaires and verify if the Agents d'Appariement properly classify these. He/she should make certain that Contrôleurs de l'Appariement give priority attention to cases classified by the Agents d'Appariement as "non-apparié" and "Possible appariement".

8. The Superviseur d'Appariement will sign the completed Questionnaire de l'EPC for each household he/she verified on the front page of the Questionnaire de l'EPC.
CHAPTER 3 - Guidelines for Field Visite de Conciliation

1. To determine the final match status of cases left unresolved after matching, les visites de conciliations will be conducted. These cases include persons initially classified as "Possible appariement" and "enumerated in recensement but not in the EPC".

2. Some EPC entries may be classified as "Possible appariement" cases due to similarities for certain characteristics or lack of corresponding recensement information. In this case box 1 of item 33 will be marked on the front page of the Questionnaire de l'EPC and enumerator instructions will be written on page 5.

3. It is also possible to have recensement data without any corresponding EPC information. This is true for persons enumerated in the recensement but not in the EPC. Such cases will have box 2 of item 33 marked, with enumerator instructions written on page 5 and person-data listed in the EPC, Visite de Conciliation Section on pages 5, 6, and 7.

4. It is also possible to have EPC data without corresponding recensement data. This is true for persons enumerated in the EPC but not in the recensement. Such cases will have box 1 of item 33 marked on the front page of the Questionnaire de l'EPC and in the comments section information as to who was enumerated in the EPC but not in the recensement. There will be additional instructions on page 5 of the Questionnaire de l'EPC.
   
   a. It is very important when trying to determine whether these people were enumerated in the recensement, to carefully ask question 9 on page 3.
   
   b. Only people who were defined as usual residents during the recensement should receive a code of 1 for "Yes."

This chapter provides the instructions on how to carry out the Reconciliation Survey.

3.1 General Instructions for Enumerators

1. Enumerators should use pencil in making notes and write legibly and firmly.

2. The Enumerator should read the entire content of the questionnaire, especially the instructions in Section B, page 5 "Additional Reconciliation Instructions" portion before making the visite de conciliation. This will give the Enumerator the necessary information about the household that they are going to visit, likewise guide them on what to ask and why. They should follow the instructions des Contrôleur de l'Appariement written on the questionnaire.

3. Note that entries or writings in green ink are made by the office supervisor; in red, by the Contrôleur de l'Appariement; and in blue, by the Agent d'Appariement. Thus, in deciding what final entry to consider, the following rule is adopted: Green-inked entries, if any, are taken as final, otherwise, writings in red override entries in blue or pencil.
4. The Enumerator should write comprehensive notes about the result of the reconciliation interview in Section D, page 5 marked "Comments - Additional Remarks That Will Assist in Making the Decision on Final Status".

5. Before leaving the household, the Enumerator should review the questionnaire and make certain that all instructions have been properly followed.

6. Immediately after the interview, the Enumerator should sign on the space provided on page 1 of the Questionnaire de l'EPC, Section 9, Item 29 and enter the date of the successful visit.

7. All questionnaires should be submitted to the Superviseur au Terrain for further scrutiny. This will be done while they are still in their areas of assignment.

3.2 General Instructions pour les Superviseurs au Terrain

1. It is the responsibility of the Superviseur au Terrain to check and verify the work done by his/her interviewers. The Superviseur au Terrain should carefully review completed questionnaires that are submitted to them.

2. For "Possible appariement" questionnaires, the Superviseur au Terrain should mark the final match status for each person in the Questionnaire de l'EPC as "apparié", "non-apparié", "arrivant", "recensement omission" or "non-applicable", as appropriate. There should not be any cases of "possible appariement". The Superviseur au Terrain should ask the enumerator to clarify any wrong or ambiguous information in the questionnaire. It is easier and cheaper to make revisits while still in the field rather than after the questionnaire arrives in the central office.

3. If a Questionnaire de l'EPC was completed because it was "Dénombre dans le Recensement mais pas dans l'EPC", then the Superviseur au Terrain should mark the final Enumeration Status on page 7. There are four possible choices:

   a. A person is a "dénombrement correct" if he/she was a usual resident correctly enumerated in the recensement.

   b. "Dénombrement erroné - inventée" refers to persons who were fabricated during the recensement enumeration.

   c. "Duplication" refers to persons that were enumerated twice during the recensement in the same household.

   d. "Non-applicable" refers to persons who were born after the recensement reference night.

4. If an "Dénombre dans le recensement mais pas dans l'EPC" questionnaire contains at least one "dénombrement correct", the Superviseur au Terrain must assign a EPC household serial number. The EPC household serial numbers that will be assigned to these households will be sequential for an DR and will follow the household serial number of the last household listed in the same DR by the EPC enumerator.
5. For example, if the last household listed in the DR by the EPC enumerator has serial number 60, then the first EPC household serial number that will be assigned to the non-apparié recensement households for the DR will be 61.

3.3 General Instructions pour les Contrôleurs de l'Appariement

After extensive verification in the field, the Superviseur au Terrain will send the Questionnaire de l'EPC used in the visite de conciliation back to the central office.

The Contrôleur de l'Appariement has the responsibility to evaluate the completed Questionnaire de l'EPC after the reconciliation. He/she will review the final match status of cases that were reconciled based on the information gathered from the revisit.

If a Questionnaire de l'EPC was completed because it was "Dénombré dans le Recensement mais pas dans l'EPC", then the Contrôleur de l'Appariement should verify the "Statut de Dénombrement" that was marked by the Superviseur au Terrain.

3.4 Transmittal of Questionnaires de l'EPC and Materials

To facilitate handling and data processing, the EPC listing sheets and questionnaires should be grouped together. After the final match status of each reconciliation case has been determined and indicated in the Questionnaire de l'EPC, all Questionnaires de l'EPC should be placed in the enumerator's bag in sequential order by EPC household serial number with the listing sheets and DR maps on top. It is very important that the questionnaires be ordered to save time for the supervisor when he reviews the enumerator's work and for the Contrôleur de l'Appariement in the central office.

The following materials should also be transmitted to the DPS at the end of the visites de conciliations:

1. Completed EPC Listing Sheets and Questionnaires
2. Sketch maps/block maps
5. Completed Enumerator's Daily Accomplishment Report
6. Completed Progress Reports
7. Completed Record of Observation
8. ID cards
9. Unused Questionnaires de l'EPC and materials
After the review/scrutiny and checking of all the Questionnaires de l'EPC the Superviseur au Terrain should transmit these with all the other EPC materials and forms (completed and unused) to the DPS. In transmitting, he should be guided by the following:

4. All EPC materials should be submitted to the DPS within seven (7) days after the end of enumeration period. The 7-day allowance will give the Superviseur au Terrain enough time to check and review the Questionnaires de l'EPC before transmitting these to the DPS.

5. Pack all Questionnaires de l'EPC/List of Households and other EPC materials in boxes such that the completed questionnaires and listing sheets are grouped together for an DR. All unused materials, reports, manuals and ID cards should be placed in a separate box, if possible.

6. Label the boxes indicating the point of origin (name of area) and contents. Number the boxes systematically, e.g., Box 1 of 2 boxes; Box 2 of 2 boxes.

7. Prepare two (2) copies of EPC (Transmittal/Receipt of Completed/Unused Questionnaires) specifying all accomplished questionnaires and unused questionnaires to be submitted to the DPS. The duplicate copy will be signed and returned to the Superviseur au Terrain upon receipt of the transmittal by the EPC Supervisor.

8. The receiving officer should check if the questionnaires are in sequential order by EPC household serial number and correct them if they are not. At the same time, he/she should see if the number of completed questionnaires in an DR matches the number indicated on the appropriate EPC form. If they do not match, he/she should get an explanation from the Superviseur au Terrain.