

Appendix A: QUALITY CONTROL FORMS

<u>Exhibit</u>	<u>Form</u>
1	F-236, Crew Leader's Check List for Map Review and Preparatory Work
2	F-239, Daily Report of Field Review
3	F-239A, Daily Report of Field Review (Single Stage)
4	F-243, Record of Field Review, PH-1 and PH-2
5	F-243A, Record of Field Review, Single Stage
6	F-244, Record of Field Review, PH-3 and PH-4
7	F-267, Office QC Record for PH-1
8	F-268, Office QC Record for PH-2
9	F-278, Office Verification of Transcription to PH-3 or PH-4
10	F-280, Office QC Record for PH-3 or PH-4
11	F-287, Office Payroll Verification Record for Two-Stage Areas
12	F-288, Evaluation of Map Review and Preparatory Work
13	F-289, Evaluation of Field Review for PH-1 and PH-2
14	F-289A, Evaluation of Field Review for PH-3 or PH-4
15	F-289B, Evaluation of Field Review, Single Stage
16	F-308, Regional Office Quality Control Report for Single-Stage Areas
17	F-309, Regional Office Quality Control Report

QUALITY CONTROL OF THE FIELD ENUMERATION

REMARKS - Use this section to tell the Technical Officer about any problems in the enumeration assignment not covered by the Check List. Also record the numbers of ED's which were split in Item 6.

COMPLETE ITEMS 1 THROUGH 3 BEFORE VISITING THE ENUMERATOR ASSIGNMENT

Instructions		Enter ED numbers in the order to be enumerated	Is there a map or description for each ED? (Mark "X")	
			Yes	No
ITEM 1	<p>Check if there is an enumerator map for each ED (or name and address of an institution or special dwelling place which is a separate ED).</p> <p>If you do not have a map or description for each ED, call the District Supervisor immediately and arrange to get one.</p>			
ITEM 2A NON-MILEAGE ED'S ONLY	List block numbers in the space provided on the pink map backing sheet in the order in which the Enumerator should visit them.		Mark (X) as you complete each Item for all ED's	
		<input type="checkbox"/>		
ITEM 2B NON-MILEAGE ED'S ONLY	Mark the first two blocks on each ED map with the starting point and arrows to show direction of travel for Enumerator.		<input type="checkbox"/>	
ITEM 3 MILEAGE ED'S ONLY	Mark each ED map with a starting point. Number the first three roads on the Enumerator's map in the order in which the Enumerator should visit them. (If the ED is laid out in blocks, follow the procedure in Item 2, but check the box in Item 3.)		<input type="checkbox"/>	

QUALITY CONTROL OF THE FIELD ENUMERATION

ITEM 5 - COMPLETE THIS ITEM FOR NON-MILEAGE ED'S ONLY. USE A SEPARATE PAGE FOR EACH ED. THE PURPOSE IS TO ESTIMATE THE NUMBER OF DWELLINGS IN THE ED, BLOCK BY BLOCK.							ED number
Copy these from ED map before you start listing		Estimated number of dwellings in this block (c)	FOR USE IN FIELD REVIEW	Copy these from ED map before you start listing		Estimated number of dwellings in this block (c)	FOR USE IN FIELD REVIEW
Block number (a)	Names of all streets in this block (b)		Number of dwellings listed by Enumerator (Explain serious differences below*) (d)	Block number (a)	Names of all streets in this block (b)		Number of dwellings listed by Enumerator (Explain serious differences below*) (d)
	----- ----- -----				----- ----- -----		
	----- ----- -----				----- ----- -----		
	----- ----- -----				----- ----- -----		
	----- ----- -----				----- ----- -----		
	----- ----- -----				----- ----- -----		
	----- ----- -----				----- ----- -----		
	----- ----- -----				----- ----- -----		
	----- ----- -----				----- ----- -----		
TOTAL				TOTAL			
				GRAND TOTAL			
*REMARKS (Explain differences found during Field Review):							

IF THERE ARE MORE THAN 6 ED'S IN THIS ASSIGNMENT, USE ANOTHER CHECK LIST, FORM F-236

ITEM 5 - COMPLETE THIS ITEM FOR NON-MILEAGE ED'S ONLY. USE A SEPARATE PAGE FOR EACH ED. THE PURPOSE IS TO ESTIMATE THE NUMBER OF DWELLINGS IN THE ED, BLOCK BY BLOCK.							ED number
Copy these from ED map before you start listing		Estimated number of dwellings in this block (c)	FOR USE IN FIELD REVIEW	Copy these from ED map before you start listing		Estimated number of dwellings in this block (c)	FOR USE IN FIELD REVIEW
Block number (a)	Names of all streets in this block (b)		Number of dwellings listed by Enumerator (Explain serious differences below *) (d)	Block number (a)	Names of all streets in this block (b)		Number of dwellings listed by Enumerator (Explain serious differences below *) (d)
	----- ----- -----				----- ----- -----		
	----- ----- -----				----- ----- -----		
	----- ----- -----				----- ----- -----		
	----- ----- -----				----- ----- -----		
	----- ----- -----				----- ----- -----		
	----- ----- -----				----- ----- -----		
	----- ----- -----				----- ----- -----		
	----- ----- -----				----- ----- -----		
TOTAL				TOTAL			
				GRAND TOTAL			
<p>* REMARKS (Explain differences found during Field Review):</p> <hr/> <hr/> <hr/> <hr/>							

IF THERE ARE MORE THAN 6 ED'S IN THIS ASSIGNMENT, USE ANOTHER CHECK LIST, FORM F-236

COMPLETE ITEM 6 FOR NON-MILEAGE ED'S ONLY

ITEM 6 NUMBER OF UNITS IN ENTIRE ENUMERATOR ASSIGNMENT	ED number (a)	Estimated number of units for each ED (Grand total of Column (c) in Item 5) (b)	<p>(c) If the total is 500 or more, the assignment must be divided among two or more Enumerators. Always make the EA, which has the prelistings in Item 4, a first assignment.</p> <p>SHOULD THIS ASSIGNMENT BE DIVIDED?</p> <p><input type="checkbox"/> Yes <input type="checkbox"/> No</p> <p>If "Yes," follow the instructions for dividing the EA in the Crew Leader's Manual. Show new EA's and ED's in the "Remarks" section on Page 2.</p>
	TOTAL		

ITEM 7 - List each place you come to which may have to be enumerated by special procedure. List all hotels, motels, YMCA's, college dormitories, hospitals, jails, and institutions. If you have any doubt, list and decide later.

If the place you list is in one of the following groups, make it a special ED:

T-Night places - Hotels, motels, YMCA's, provided these places have 50 rooms or more for transient guests.

General Hospitals - Places with 50 or more patients.

M-Night places - Flop-houses, missions, etc., provided these places have 50 or more rooms or beds.

Some Crew Leaders will receive a Form F-269 from the District Office on which are listed places already known to require special enumeration procedures. For each place you list, which is not on an F-269, enter the number of rooms, beds, persons, or other units in one of Columns (b) through (f) which best describes the kind of place. If the rules show that the place should be a separate ED, enter the ED number in Column (g). If the place is listed on F-269, fill in Columns (a) through (g) from the F-269.

All jails regardless of size.

Institutions - Homes for juvenile delinquents, crippled children, etc., with 50 or more inmates.

Non-institutional Group Quarters - Convents, monasteries, etc., with 50 or more persons.

If you receive an F-269 which shows a place which you failed to list, and you are certain that the place is not in the ED shown, notify the District Office by telephone.

Military Installations - Army posts, naval stations, etc., with 50 or more persons.

Name and address of place (a)	Number of persons or accommodations *					ED number if a separate ED (g)
	T-Night (Rooms or units) (b)	M-Night (Rooms, units, or beds) (c)	Institu- tion (Persons) (d)	Non- insti- tution group quarters (Persons) (e)	Other military instal- lation, etc. (Persons) (f)	

* If shown on F-269, copy without making further inquiry.

COMPLETE ITEMS 8-12 FOR EACH ED IN THIS EA												
ITEM 8	Have any of the physical features of the boundaries changed? For example, has a boundary river or stream changed course or have boundary streets been removed to make way for a new highway? If "Yes," attach a sketch or written description of the difference to this check list showing how you changed the map.	ED number										
		Yes										
		No										
ITEM 9	Will any of the ED boundaries be difficult for the Enumerator to locate? For example, is one of them an invisible political line? If "Yes," make a notation here which will help the Enumerator identify those boundaries. When you make up assignments for Enumerators before training, you will transfer this notation to his ED Listing Book. For example, the boundary is the city limits which are not visible on the ground. One end of this boundary intersects Ferndale Road at a point where blacktop paving ends and concrete paving begins. You might identify this end of the boundary as follows: →	ED number										
		Yes										
		No										
		<div style="text-align: center;"> <i>Example</i> </div>										
ITEM 10	Are there any streets with names different from those on the map; new streets; other changes? If "Yes," make all necessary corrections and additions to both your map and the Enumerator's map.	ED number										
		Yes										
		No										
ITEM 11	Are there any incorporated places in the Enumerator's assignment which are not separate ED's?..... If "Yes," follow the instructions in your Manual and submit the required map with the check list.										Mark (X) for each Item <input type="checkbox"/> Yes <input type="checkbox"/> No	
ITEM 12	If this is a resort area, are there 50 or more seasonal vacancies in any one of these ED's?..... If "Yes," assign such ED's on an hourly rate and correct Form F-237 accordingly.										<input type="checkbox"/> Yes <input type="checkbox"/> No	
REMARKS												

FORM 60-11-239A (12-17-59)		U.S. DEPARTMENT OF COMMERCE BUREAU OF THE CENSUS		1. DATE		4. NAME OF CREW LEADER													
F-239A DAILY REPORT OF FIELD REVIEW 1960 CENSUS OF POPULATION AND HOUSING (Single Stage)		2. DISTRICT OFFICE NUMBER		3. STATE		5. Signature of person completing this form													
INSTRUCTIONS - Each Crew Leader and Field Reviewer must prepare a separate form daily and mail it to the District Office.		ENTER NUMBER OF ERRORS FOUND IN FIELD REVIEW		FIELD REVIEW ACTION (Check one)				CLOSE-OUT REVIEW (Check one)											
LINE NO.	NAME OF ENUMERATOR (a)	SEC-SECTION I	SEC-SECTION II	SEC-SECTION III	SEC-SECTION IV	SEC-SECTION V	SEC-SECTION VI	SEC-SECTION VII	SEC-SECTION VIII	FIRST REVIEW	SEC. AND THIRD REVIEW	FINAL REVIEW	CLOSE-OUT REVIEW						
		(b)	(c)	(d)	(e)	(f)	(g)	(h)	(i)	NO FURTHER REVIEW UNTIL FINAL	ENUMERATOR RE-LEASED	FURTHER REVIEW NECESSARY	EA UNACCEPTABLE	EA ACCEPTED	EA ASSIGNED TO CLOSE-OUT ENUMERATOR (s)				
1	(a)									(j)	(k)	(l)	(m)	(n)	(o)	(p)	(q)	(r)	(s)
2																			
3																			
4																			
5																			
6																			
7																			
8																			
9																			
10																			
TOTALS																			

1 Crew Leader, check when releasing enumerator. Field Reviewer, check when recommending enumerator for release.

(Use reverse side for Remarks)

FORM 60-11-243 (11-3-59)		U.S. DEPARTMENT OF COMMERCE BUREAU OF THE CENSUS		PAGE 1	
F-243 RECORD OF FIELD REVIEW PH-1 AND PH-2 1960 CENSUS OF POPULATION AND HOUSING				a. District Office Number	
				b. ED Numbers	
				c. Name of Crew Leader	
				d. Name of Field Reviewer	
e. Enumerator	Name	Address			Telephone Number
f. Appointments for review		First review	Second review	Third review	Final review
	Date				
	Time				
	Place				
Section I - CHECK FOR MISSED UNITS		First review	Second review	Third review	Final review
Check housing units on →		Page one of Listing Book	All pages not yet checked	All pages not yet checked	All pages not yet checked
1. Number of units prelisted on F-236 not in Listing Book.					
Enter in Column d, Item 5 of the F-236, the number of housing units listed in each block by enumerator.					
Check housing units on →		Last full page in Listing Book	Last full page in Listing Book	Last full page in Listing Book	Pages 4, 9, 14, 19, and 24 in Listing Book
Listing Book Review		(Check one)		(Check one)	
		Yes	No	Yes	No
Section II -					
2. (For PH-2) Are block numbers in Column 2 in correct order?					
3. Are housing units listed in correct sequence according to address?					
4. Is sample key (Column 5) in correct order?					
5. Does Column 12 show number of persons for each completed housing unit?					
6. Is there an "A" or "GQ" for each sample unit in Column 13?					
7. Total lines answered "No" in Section II.					
Section III -					
8. Are Columns 1, 3 and 4 adequately filled for each housing unit?					
9. Is Column 6 filled correctly?					
10. Is Column 7 filled for each housing unit?					
11. Are callbacks recorded in Columns 8 and 9?					
12a. Is method of completion shown in Columns 10 and 11?.....					
b. Is number of closeout cases reasonable?.....					
13. Total lines answered "No" in Section III					

Section IV - POPULATION REVIEW	First review	Second review	Third review	Final review
<p>Check persons in housing units on → (Check only persons in housing units completed by interview)</p> <p>For Lines 14 through 20 tally and total the number of times.</p> <p>14. Either P1 or H1 is not in correct sample key order.</p>	<p>Last five FOSDIC pages with entries Last page checked</p> <p>ED. _____</p> <p>Page _____</p>	<p>Last five FOSDIC pages with entries Last page checked</p> <p>ED. _____</p> <p>Page _____</p>	<p>Last five FOSDIC pages with entries Last page checked</p> <p>ED. _____</p> <p>Page _____</p>	<p>FOSDIC pages 11, 44, 77, in all books</p>
<p>15. Blank, double mark, or bad FOSDIC mark in P2 through P7.</p>				
<p>16. P3 shows 5 or more "Nonrelatives" or one or more "Inmates" but P1 and H1 are not GQ.</p>				
<p>17. P3 does not show one and only one "Head" for a housing unit (Exclude GQ's).</p>				
<p>18. P5 is "Other" and "Race" is not specified.</p>				
<p>19. P6 shows decade of birth of 1950 or 1960 and P3 is "Head" or "Wife".</p>				
<p>20. P6 shows decade of birth of 1950 or 1960 and P7 is other than "Never married"</p>				
<p>21. Total errors in Section IV.</p>				
<p>Section V - HOUSING REVIEW</p>				
<p>For Lines 22 through 29 tally and total all blanks, double marks, and bad FOSDIC marks in -</p> <p>22. H1</p>				
<p>23. H2 through H11.</p>				
<p>24. H12 when H7 is "Occupied."</p>				
<p>25. H13 when H7 is "Vacant."</p>				
<p>26. (For PH-2) H14 when H12 is "Owned or being bought" or H13 is "For sale only."</p>				
<p>27. (For PH-2) H15 when H14 is "1 unit-no business."</p>				
<p>28. (For PH-2) H16 when H12 shows "Rented."</p>				
<p>29. (For PH-2) H16 when H13 shows "For rent."</p>				
<p>30. Total errors in Section V.</p>				
<p>Also check the following points when you review the FOSDIC Book:</p>	(Check one)	(Check one)	(Check one)	(Check one)
<p>31. Are FOSDIC pages free of creases, tears, or marks in margin?</p>	Yes No	Yes No	Yes No	Yes No
<p>32. Are persons in P2 listed in proper order?</p>				
<p>33. Is Enumerator leaving enough lines for callbacks?</p>				
<p>34. (For PH-2) Are block and page numbers being entered?</p>				
<p>35. Are blank lines free of marks which may be picked up by FOSDIC?</p>				
<p>36. Is Enumerator cancelling lines properly?</p>				

Section VI - FOSDIC BOOK - LISTING BOOK REVIEW	First review	Second review	Third review	Final review
Check housing units on →	Last five FOSDIC pages with entries	Last five FOSDIC pages with entries	Last five FOSDIC pages with entries	FOSDIC pages 11, 44, 77 in all ED books
37. Check that P1 agrees with Column 5 of Listing Book. Tally for each time they differ.				
38. Compare number of persons in FOSDIC Book with Column 12 of Listing Book. Tally each time they differ.				
39. Total errors in Section VI.				

Section VII - HOW TO TAKE ACTION

40. First Review

Enter number from --	Circle entry in Column (a) if greater than Column (b)		How to take review action (c)	Initial the action you take (d)
	(a)	(b)		
Section I, Line 1	Non-mileage	2	If there are no circles in Column (a), do not review again until final review.	
	Mileage	1		
Section II, Line 7		1	The Crew Leader will release the Enumerator if -- (1) Section I is circled OR (2) 3 or more in Sections II through VI are circled	
Section III, Line 13		3		
Section IV, Line 21		16	If none of the above, a second review will be necessary.	
Section V, Line 30		12		
Section VI, Line 39		1		

41. Second Review

Enter number from--	Circle entry in Column (a) if greater than Column (b)		How to take review action (c)	Initial the action you take (d)
	(a)	(b)		
Section I, Line 1		0	If there are no circles in Column (a), do not review again until final review.	
Section II, Line 7		1		
Section III, Line 13		3	The Crew Leader will release the Enumerator if -- (1) Section I is circled OR (2) 2 or more in Section II through VI are circled	
Section IV, Line 21		16		
Section V, Line 30		12	If none of the above, a third review will be necessary.	
Section VI, Line 39		1		

42. Third Review				
Enter number from--	Circle entry in Column (a) if greater than Column (b)		How to take review action (c)	Initial the action you take (d)
	(a)	(b)		
Section I, Line 1		0	If there are no circles in Column (a), do not review again until final review.	
Section II, Line 7		1		
Section III, Line 13		3		
Section IV, Line 21		16	The Crew Leader will release the Enumerator if one or more circles are in Column (a).	
Section V, Line 30		12		
Section VI, Line 39		1		

43. Final Review				
Enter number from --	Circle entry in Column (a) if greater than Column (b)		How to take review action (c)	Initial the action you take (d)
	(a)	(b)		
Section I, Line 7		0	If there are no circles in Column (a), accept EA as completed.	
Section II, Line 13		1		
Section III, Line 21		3		
Section IV, Line 30		16	If there are one or more circles in Column (a), EA is not acceptable, return to Enumerator for correction.	
Section V, Line 30		12		
Section VI, Line 39		1		

Section VIII - CLOSEOUT REVIEW

44. Inspect FOSDIC entries of all units completed by closeout procedure.		
45. Tally each population line with no entries for race and sex.	Tally	Total
46. Tally each housing unit which does not have -- "Head in P3 for one person, or "VAC" in P2, and entries in H3, H4 and H7.	Tally	Total
47. Is sum of Lines 45 and 46 greater than 25? (Check one box)		
<input type="checkbox"/> Yes - Give to closeout enumerator. Verify transcription when assignment is returned.		
<input type="checkbox"/> No - Fill in necessary entries according to instructions in your manual and proceed to transcription verification.		

Section IX - TRANSCRIPTION VERIFICATION (To be done after closeout review is completed)

48. Check the last sample housing unit or GO on each page of the Listing Book. Compare population and housing entries for these units in the Stage I and Stage II FOSDIC Books.		
49. Enter the number of units checked.....		Number
50. Tally and total the number of transcription errors	Tally	Total
51. Is the number in Line 50 less than the number in Line 49? (Check one box)		
<input type="checkbox"/> Yes - The transcription is acceptable. Send to District Office.		
<input type="checkbox"/> No - The transcription is not acceptable and must be completely corrected and verified.		

FORM 60-11-243A (12-21-69)		U.S. DEPARTMENT OF COMMERCE BUREAU OF THE CENSUS		a. District Office Number		b. ED Numbers			
F-243A RECORD OF FIELD REVIEW SINGLE STAGE				c. Name of Crew Leader		d. Name of Field Reviewer			
1960 CENSUS OF POPULATION AND HOUSING									
e. Enumerator	Name	Address				Telephone Number			
f. Appointments for review		First review	Second review	Third review	Final review				
	Date								
	Time								
	Place								
Section I - CHECK FOR MISSED UNITS		First review	Second review	Third review	Final review				
Check housing units on →		Page one of Listing Book	All pages not yet checked	All pages not yet checked	All pages not yet checked				
1. Number of units prelisted on F-236 not in Listing Book.									
2. Enter in column d, Item 5 of the F-236, the number of housing units listed in each block by enumerator.									
Section II - LISTING BOOK REVIEW		Last full page in Listing Book		Last full page in Listing Book		Last full page in Listing Book		Pages 4, 9, 14, 19, and 24 in Listing Book	
		(Check one)		(Check one)		(Check one)		(Check one)	
		Yes	No	Yes	No	Yes	No	Yes	No
3. (For PH-2) Are block numbers in column 2 in correct order?									
4. Are housing units listed in correct sequence according to address?									
5. Is sample key (Column 5) in correct order?									
6. Does Column 12 show number of persons for each completed housing unit?									
7. Do Columns 12 and 14 agree for completed units?									
8. Is there an "A" or "GQ" for each sample unit in Column 13?									
9. Total lines answered "No" in Section II.									
Also check the following points when you review the Listing Book:		(Use same sample pages as above)							
10. Are Columns 1, 3, and 4 adequately filled for each housing unit?									
11. Is Column 6 filled correctly?									
12. Is Column 7 filled for each housing unit?									
13. Are callbacks recorded in Columns 8 and 9?									
14. Is Method of Completion shown in Columns 10 and 11?									

PAGE 2

Section III - STAGE I POPULATION REVIEW	First review	Second review	Third review	Final review
<p>Check persons in housing units on—→ (Check only persons in housing units completed by interview)</p> <p>Tally the number of times that:</p>	<p>Last five pages in ED book with entries</p> <p>ED _____</p> <p>Last page checked _____</p>	<p>Last five pages in ED book with entries</p> <p>ED _____</p> <p>Last page checked _____</p>	<p>Last five pages in ED book with entries</p> <p>ED _____</p> <p>Last page checked _____</p>	<p>FOSDIC pages 11, 44, 77, in all books</p>
15. Either P1 or H1 is not in correct sample key order				
16. Blank, double mark, or bad FOSDIC mark in P2 through P7.				
17. P3 shows 5 or more "Nonrelatives" or one or more "Inmates" but P1 and H1 are not GQ				
18. P3 does not show one and only one "Head" for a housing unit (Exclude GQ's).				
19. P5 is "Other" and "Race" is not specified.				
20. P6 shows decade of birth of 1950 or 1960 and P3 is "Head" or "Wife".				
21. P6 shows decade of birth of 1950 or 1960 and P7 is other than "Never married".				
22. Total errors in Section III				
<p>Section IV - STAGE I HOUSING REVIEW</p> <p>For Lines 23 through 30 tally and total all blanks, double marks, and bad FOSDIC marks in:</p>	(Use same sample pages as above)			
23. H1.				
24. H2 through H11.				
25. H12 when H7 is "Occupied."				
26. H13 when H7 is "Vacant."				
27. (For PH-2) H14 when H12 is "Owned or being bought" or H13 is "For sale only."				
28. (For PH-2) H15 when H14 is "1 unit-no business."				
29. (For PH-2) H16 when H12 shows "Rented".				
30. (For PH-2) H16 when H13 shows "For rent."				
31 Total errors in Section IV				

Also check the following points when you review the Stage I ED Book:	(Check one)		(Check one)		(Check one)		(Check one)	
	Yes	No	Yes	No	Yes	No	Yes	No
32. Are FOSDIC pages free of creases, tears or marks in margin?								
33. Are persons in PH-2 listed in proper order?								
34. Is enumerator leaving enough lines for callbacks?								
35. (For PH-2) Are block and page numbers being entered?								
36. Are blank lines free of marks which may be picked up by FOSDIC?								
37. Is enumerator cancelling lines properly?								
Section V - STAGE I ED BOOK - LISTING BOOK COMPARISON	First review		Second review		Third review		Final review	
Check housing units on →	Last five pages in ED book with entries		Last five pages in ED book with entries		Last five pages in ED book with entries		FOSDIC pages 11, 44, 77 in all ED books	
38. Check that P1 in Stage 1 FOSDIC Book agrees with Column 5 of Listing Book. Tally each time they differ.								
39. Compare number of persons in Stage I FOSDIC Book with column 12 of Listing Book. Tally each time they differ.								
40. Total errors in Section V.								
Section VI - TRANSCRIPTION VERIFICATION	(Use same sample pages as above)							
Compare population and housing entries in the Stage I and Stage II ED Books. Have the Enumerator read the Stage II entries to you.	Tally	Total	Tally	Total	Tally	Total	Tally	Total
41. Tally and enter the total number of transcription errors.								
Also check the following points in the Stage II ED Book for the same housing units as above:	(Check one)		(Check one)		(Check one)		(Check one)	
	Yes	No	Yes	No	Yes	No	Yes	No
42. Are pages free of creases, tears, or other unauthorized marks in the margin?								
43. Are blank sections free of marks which may be picked up by FOSDIC?								
44. Is enumerator entering page number from PH-1 or PH-2 for each unit?								
45. Is enumerator filling "Continuation" circle when necessary?								

PAGE 4

Section VII - STAGE II ED BOOK REVIEW - HOUSING ITEMS	First review	Second review	Third review	Final review
Do not include close-out cases or GQ's. Count all omissions, double entries and bad FOSDIC marks in:	Last five completed sample units in the Listing Book	Last five completed sample units in the Listing Book	Last five completed sample units in the Listing Book	First completed sample unit on Listing Book pages 2, 4, 6, 8, and 10
46. H17.				
47. H18a when H17 is "on a place of less than 10 acres".				
48. H18b when H17 is "on a place of 10 or more acres".				
49. H19 through H21.				
50. H22 through H28 when H7 is "Occupied".				
51. H29 through H34.				
52. H35 when H7 is "Occupied".				
53. H35a when H35 is "Yes".				
54. H36 when H7 is "Occupied".				
55. H37 when H3 is "Trailer" and H7 is "Occupied".				
56. H38 when H7 is "Vacant" (one of three vacancy entries).				
57. H39 when H12 is "Owned or being bought" or H13 is "For sale only".				
58. H40 when H39 is "1 unit - no business".				
59. H41 when H12 is "Rented" or H13 is "For rent".				
60. H42 when H12 is "Rented" or H13 is "For rent".				
61. H43a, b, and c, when H12 is "Rented" or H13 is "For rent". (Each one of the three parts must be answered.)				
62. H44a when H43a is "Yes" and H7 is "Occupied".				
63. H44b when H43b is "Yes" and H7 is "Occupied".				
64. H44c when H43c is "Yes" and H7 is "Occupied".				
65. H45 when H12 is "Rented" or H13 is "For rent".				
66. H46 when H45 is "Yes" and H7 is "Occupied".				
67. Total errors in Section VII				
Section VIII - STAGE II ED BOOK REVIEW - POPULATION ITEMS	(Use same sample housing units as above)			
Do not include close-out cases. Count omissions, double entries, and bad FOSDIC marks or inadequate written entries in:				
68. P3a when P3 is "Rel" or "Non"				

QUALITY CONTROL FORMS

Section VIII (Continued)	First review	Second review	Third review	Final review
69. P8				
70. P9 when P8 is foreign country				
71. P10 through P12				
72. P13a when P12 is "1959-1960", "1958", "1957" or "April 1955 to December 1956".				
FOR PERSONS BORN BEFORE APRIL 1, 1955				
73. P13b when P13a is "This city".				
74. P13c when P13a is "Not in a city", "This city", or "Different city".				
75. P14				
76. P15 when P14 is "Kindergarten", "Elementary school", "High school", or "College".				
77. P16 when P14 is "Kindergarten", "Elementary school", "High school", or "College", and P6 is "April, 1925", or after.				
78. P17 when P16 is "Yes, regular school".				
79. P18 and P19 when P7 is "Mar", "Wid", "Div", or "Sep".				
80. P20 when P7 is "Mar", "Wid", "Div", or "Sep", and P4 is "Female".				
81. P21				
FOR PERSONS BORN BEFORE APRIL 1, 1946				
82. P22				
83. P23 when P22 is "Yes".				
84. P24 when P22 is "No".				
85. P25 when P24 is "No".				
86. P26 when either P24 or P25 has an entry.				
87. P27 (all parts) when P22 is "Yes" or P26 is "1960", "1959", "1955-58", or "1950-54", Be sure entries are adequate.				
88. P28a when P22 is "Yes".				
89. P28b when P28a is "This city" or "Different city".				
90. P28c when P22 is "Yes".				
91. P29 when P22 is "Yes".				
92. P30 when P22 is "Yes" or P26 is "1960", "1959", "1955-58", or "1950-54".				
93. P31 through P33 when P30 is "Yes".				
94. P34				
95. P35 when P4 is "Male".				
96. Total errors in Section VIII				

PAGE 6

Section IX - SUMMARY OF ERRORS	First review Circle entry in Column (a) if greater than Column (b)		Second review Circle entry in Column (c) if greater than Column (d)		Third review Circle entry in Column (e) if greater than Column (f)		Final review Circle entry in Column (g) if greater than Column (h)		
	Enter number of errors from:	Number of errors (a)	Standard (b)	Number of errors (c)	Standard (d)	Number of errors (e)	Standard (f)	Number of errors (g)	Standard (h)
Section I, Line 1		NON- MILEAGE: 2 MILEAGE: 1		0*		0			0
Section II, Line 9		1		1		1			1
Section III, Line 22		16		16		16			16
Section IV, Line 31		12		12		12			12
Section V, Line 40		1		1		1			1
Section VI, Line 41		5		5		5			5
Section VII, Line 67		5		5		5			5
Section VIII, Line 96		13		13		13			13
Section X - HOW TO TAKE ACTION								Initial the action you take	
First Review	The Crew leader will release the Enumerator if Section I is circled or there are 3 or more circles in Column (a) for Sections II through VIII.								
	If there are no circles in Column (a), do not review again until final review								
	If there are 1 or 2 circles, a second review will be necessary.								
Second Review	The Crew leader will release the Enumerator if Section I is circled or there are 2 or more circles in Column (c) for Sections II through VIII.								
	If there are no circles in Column (c) for Sections II through VIII, do not review again until final review.								
	If there is 1 circle, a third review will be necessary.								
Third Review	The Crew leader will release the Enumerator if there are 1 or more circles in Column (e).								
	Otherwise, do not review again until final review.								
Final Review	If there are 1 or more circles in Column (g), EA is not acceptable. If 1 circle, return to same Enumerator for correction. If more than 1 circle, reassign EA.								
	If there are no circles in Column (g), accept EA as completed.								
Section XI - CLOSEOUT REVIEW								Tally	
Inspect Stage I ED Book entries of all units completed by closeout procedure (<i>"X"</i> in Column 11 of the Listing Book)									
97. Tally each population line with no entries for race or sex									
98. Tally each housing unit which does not have: "Head" in P3 for one person, or "Vac" in P2, and entries in H3, H4 and H7.									
99. Is sum of lines 97 and 98 greater than 25? (Check one box)									
<input type="checkbox"/> Yes - Give to closeout enumerator. Record assignment on F-237. Verify entries when assignment is returned. <input type="checkbox"/> No - Accept EA. Fill in necessary entries according to instructions in your manual. Send to District Office.									

*See Appendix E, Section E5.122b.

FORM 60-11-244 (12-19-59) F-244 RECORD OF FIELD REVIEW PH-3 AND PH-4 1960 CENSUS OF POPULATION AND HOUSING	U.S. DEPARTMENT OF COMMERCE BUREAU OF THE CENSUS	a. District Office Number c. Name of Crew Leader	b. ED Numbers in this EA d. Name of Field Reviewer
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e. Enumerator	Name	Address	Telephone number
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USE A SEPARATE F-244 FOR EACH LISTING BOOK

f. Appointments for review		First Review	Intermediate Review	Final Review
	Date			
	Time			
	Place			

g. How to select units for Final Review	Starting at the top left, circle each page number in this series if there is a corresponding page in the Listing Book with a sample unit. Stop when you have circled six pages.	20 17 23 2 10 4 3 11 18 6 22 15 12 1 14 8 16 19 24 7 21 5 13 9
---	---	---

Section I - LISTING BOOK REVIEW

Review every sample housing unit on each of these pages. Tally each time:	First EA Only		Every EA
	First review	Intermediate review	Final review
Pages 1-4 of the Listing Book	Pages 5-8 of the Listing Book	First four circled page numbers in item g	
1. Callbacks are recorded incorrectly in columns 14, 14a and 15.			
2. Method of completion is incorrect in column 16 and 17.			
3. Column 18 is blank for a completed unit or otherwise does not agree with column 12. Do not count legitimate differences described in Enumerator's Reference Manual.			
4. Total errors in Section I.			

Section II - HOUSEHOLD QUESTIONNAIRE TRANSCRIPTION

Select the first 2 Household Questionnaires for sample units on these pages. Compare entries on the Questionnaire with ED Book.	Page 4 of the Listing Book	Page 8 of the Listing Book	First page circled in item g
5. Housing items - Tally each omission or other error in the ED Book if item answered on Questionnaire.			
6. Population items - Tally each omission or other error in the ED Book if item answered on Questionnaire.			
7. Total errors in Section II			

8. Is enumerator noting missing Household Questionnaire entries on outer margin of ED book?	(Check one)					
	Yes	No	Yes	No	Yes	No
9. Is enumerator bringing Household Questionnaires to the field review for units which have been transcribed?						

QUALITY CONTROL OF THE FIELD ENUMERATION

Section III - ED BOOK REVIEW - HOUSING ITEMS			
	First EA Only		Every EA
	First review	Intermediate review	Final review
Review entries for these housing units → (Exclude close-out cases) Tally each omission, double entry or bad FOSDIC mark in:	First 4 completed units on pages 1-4 of Listing Book	First 4 completed units on pages 5-8 of Listing Book	First unit on each of last 4 circled pages in item g
10. H17.			
11. H18a when H17 is "on a place of less than 10 acres" and "Occupied,"			
12. H18b when H17 is "on a place of 10 or more acres" and "Occupied,"			
13. H19 through H21.			
14. H22 through H28 when H7 is "Occupied".			
15. H29 through H34.			
16. H35 when H7 is "Occupied."			
17. H35a when H35 is "Yes".			
18. H36 when H7 is "Occupied".			
19. H37 when H3 is "Trailer" and H7 is "Occupied".			
20. H38 when H7 is "Vacant" (one of three vacancy entries).			
21. H39 when H12 is "Owned or being bought" or H13 is "For sale only".			
22. H40 when H39 is "1 unit - no business".			
23. H41 when H12 is "Rented" or H13 is "For rent".			
24. H42 when H12 is "Rented" or H13 is "For rent".			
25. H43a, b, and c, when H12 is "Rented" or H13 is "For rent". (Each one of the three parts must be answered.)			
26. H44a when H43a is "Yes" and H7 is "Occupied".			
27. H44b when H43b is "Yes" and H7 is "Occupied".			
28. H44c when H43c is "Yes" and H7 is "Occupied".			
29. H45 when H12 is "Rented" or H13 is "For Rent".			
30. H46 when H45 is "Yes" and H7 is "Occupied".			
31. Total errors in Section III.			
Section IV - ED BOOK REVIEW - POPULATION ITEMS Review entries for persons in these housing units (Exclude close-out cases)	First 4 completed units on pages 1-4 of Listing Book	First 4 completed units on pages 5-8 of Listing Book	First unit on each of last 4 circled pages in item g
FOR ALL PERSONS			
32. P3a when P3 is "Rel" or "Non".			
33. P8			
34. P9 when P8 is "Born outside the U.S."			
35. P10 through P12.			
36. P13a when P12 is "1959-1960," "1958," "1957," or "April 1955 to December 1956".			

QUALITY CONTROL FORMS

Section IV - ED BOOK REVIEW - POPULATION ITEMS (Continued)						
Review entries for these housing units → (Exclude close-out cases) Tally each omission, double entry or bad FOSDIC mark in:	First EA Only				Every EA	
	First review		Intermediate review		Final review	
	First 4 completed units on pages 1-4 of Listing Book	First 4 completed units on pages 5-8 of Listing Book	First unit on each of last 4 circled pages in item g			
FOR PERSONS BORN BEFORE APRIL 1, 1955						
37. P13b when P13a is "This city" or "Different city".						
38. P13c when P13a is "Not in a city", "This city", or "Different city".						
39. P14						
40. P15 when P14 is "Kindergarten", "Elementary school", "High school", or "College".						
41. P16 when P14 is "Kindergarten", "Elementary school", "High school", or "College", or is blank, and P6 is "April, 1925", or after.						
42. P17 when P16 is "Yes, regular school".						
43. P18 and P19 when P7 is "Mar," "Wid," "Div," or "Sep".						
44. P20 When P7 is "Mar," "Wid," "Div," or "Sep" and P4 is "Female".						
45. P21.						
FOR PERSONS BORN BEFORE APRIL 1, 1946						
46. P22.						
47. P23 when P22 is "Yes".						
48. P24 when P22 is "No".						
49. P25 when P24 is "No".						
50. P26 when P22 is "No" or blank.						
51. P27 (all parts) when P22 is "Yes" or blank or P26 is "1960", "1959", "1955-58" or "1950-54". Be sure entries are adequate.						
52. P28a when P22 is "Yes".						
53. P28b when P28a is "This city" or "Different city".						
54. P28c when P22 is "Yes".						
55. P29 when P22 is "Yes".						
56. P30 when P22 is "Yes" or blank or P26 is "1960", "1959", "1955-58", or "1950-54".						
57. P31 through P33 when P30 is "Yes", or blank.						
58. P34.						
59. P35 when P4 is "Male".						
60. Total errors in Section IV.						
CHECK THE FOLLOWING POINTS WHEN YOU REVIEW THE ED BOOK	First review		Intermediate review		Final review	
	Yes	No	Yes	No	Yes	No
61. Are FOSDIC pages free of creases, tears, or unauthorized marks in the margin?						
62. Are blank sections free of marks which may be picked up by FOSDIC?						
63. Is enumerator noting missing questionnaire entries on outer margin of FOSDIC page?						
64. Is the enumerator following the rules on the green sheet in front of the ED Book when he finds changes in sample housing units?						

QUALITY CONTROL OF THE FIELD ENUMERATION

Section V - LISTING BOOK - ED BOOK COMPARISON				
Make the comparison for these sample units (Exclude close-out cases)	First EA Only		Every EA	
	First review	Intermediate review	Final review	
	First 4 completed units on pages 1-4 of Listing Book	First 4 completed units on pages 5-8 of Listing Book	First unit on each of last 4 circled pages in item g	
65. Compare the number of persons in the ED Book with column 18 of the Listing Book. Tally each time there is a difference.				
Section VI - HOW TO TAKE ACTION				
First Review First EA only Enter totals from:	Circle entry in column (a) if greater than column (b)		How to take action on the first review (First EA Only) (c)	Initial the action you take (d)
	(a)	(b)		
Section I, line 4		2	1. If there are no circles in column (a), do not review this EA again until final review. 2. The Crew Leader will release the enumerator if column a shows 3 or more circles. 3. If there are either one or two circles in column (a) this EA must be reviewed again before Final review.	
Section II, line 7		5		
Section III, line 31		3		
Section IV, line 60		10		
Section V, line 65		0		
Intermediate Review First EA only Enter totals from:	Circle entry in column (a) if greater than column (b)		How to take action on the intermediate review (First EA Only) (c)	Initial the action you take (d)
	(a)	(b)		
Section I, line 4		2	1. The Crew Leader will release the enumerator if column (a) has 2 or more circles. 2. Otherwise, do not review the EA again until Final review.	
Section II, line 7		5		
Section III, line 31		3		
Section IV, line 60		10		
Section V, line 65		0		
Final Review Every EA Enter totals from:	Circle entry in column (a) if greater than column (b)		How to take action on the final review (Every EA) (c)	Initial the action you take (d)
	(a)	(b)		
Section I, line 4		2	1. If there are no circles in column (a), accept this EA as completed. 2. If there are one or more circles in column (a), a. Reassign this EA for correction b. Reassign other EA's for completion.	
Section II, line 7		5		
Section III, line 31		3		
Section IV, line 60		10		
Section V, line 65		0		
Section VII - CLOSE-OUT REVIEW				
66. Count the number of close-out units which did not return a Household Questionnaire ("X" in column 17 of Listing Book and dash (—) in column 18).		Tally	Total	
67. Count the number of close-out units which returned a Household Questionnaire ("X" in column 17 of Listing Book and number of persons in column 18)				
68. Is the number in line 66 four or more or is the number in line 67 ten or more?		Initial the action you take		
<input type="checkbox"/> Yes - Give to close-out enumerator. Record assignment on F-237.				
<input type="checkbox"/> No - Accept EA. Send to District Office.				

QUALITY CONTROL FORMS

79

FORM 50-11-287 (12-9-69)		U.S. DEPARTMENT OF COMMERCE BUREAU OF THE CENSUS				DISTRICT OFFICE		CREW LEADER OR FIELD REVIEWER	
F-287 OFFICE PAYROLL VERIFICATION RECORD FOR TWO-STAGE AREAS 1960 CENSUS OF POPULATION AND HOUSING		STEP 1		STEP 2		STEP 3		STEP 4	
ED NUMBERS (USE ONE FOR EACH EAT)	COMPARE NUMBER OF PEOPLE ON THESE PAGES IN THE LISTING BOOK WITH THE NUMBER IN THE LISTING BOOK (EVERY 20TH PAGE).	IF ANY ERROR IS FOUND ENTER "X" BELOW AND GO TO STEP 2. IF NO ERRORS ENTER "O" AND GO TO STEP 3	COMPARE NUMBER OF PERSONS IN THE TOSDIC BOOK WITH THE NUMBER IN THE LISTING BOOK. IF ANY DISCREPANCY OR CORRECTIONS, ENTER "X" BELOW, AND GO TO STEP 3.	ADDITION OF COLUMN IN LISTING BOOK (EVERY THIRD PAGE).	IF ANY ERROR IS FOUND, ENTER "X" BELOW AND CHECK THE ADDITION OF COLUMN (12) OR ALL PAGES. MAKE CORRECTIONS. GO TO STEP 4. IF NO ERRORS, ENTER "O" AND GO TO STEP 4.	CHECK THE ADDITION ON PAGE 27 OF THE LISTING BOOK. IF YOU FIND AN ERROR, ENTER "X" BELOW AND GO TO STEP 5. IF NO ERRORS, ENTER "O" AND GO TO STEP 5.	CORRECT FORM F-203 AS REQUIRED. CHECK LINES 2, 3, 4, 5, 6, 7, 8, 9, 10, 11, 12, 13, 14, 15, 16, 17, 18, 19, 20, 21, 22, 23, 24, 25, 26, 27, 28, 29, 30, 31, 32, 33, 34, 35, 36, 37, 38, 39, 40, 41, 42, 43, 44, 45, 46, 47, 48, 49, 50, 51, 52, 53, 54, 55, 56, 57, 58, 59, 60, 61, 62, 63, 64, 65, 66, 67, 68, 69, 70, 71, 72, 73, 74, 75, 76, 77, 78, 79, 80, 81, 82, 83, 84, 85, 86, 87, 88, 89, 90, 91, 92, 93, 94, 95, 96, 97, 98, 99, 100. THE CORRECT POPULATION AND HOUSING UNIT COUNTS ON THE ED LABEL. WRITE YOUR LAST NAME BELOW.	CREW LEADER DISTRICT NUMBER	CREW LEADER FIELD REVIEWER
17-21/N/P	2,22,42,62, ETC.	O		3,6,9,12, ETC.	O	O	Bullock	14	Hawcock
17-34	11,31,51,71, ETC.	X	X	2,5,8,11, ETC.	O	O			
17-9	8,28,48,68, ETC.	O		1,4,7,10, ETC.	O	O			
17-58	4,24,44,64, ETC.	O		3,6,9,12, ETC.	O	O			
17-43M/P	19,39,59,79, ETC.	O		2,5,8,11, ETC.	O	X			
17-18	14,34,54,74, ETC.	O		1,4,7,10, ETC.	O	O			
17-41B	13,33,53,73, ETC.	O		3,6,9,12, ETC.	O	O			
	17,37,57,77, ETC.			2,5,8,11, ETC.					
	15,35,55,75, ETC.			1,4,7,10, ETC.					
	6,26,46,66, ETC.			3,6,9,12, ETC.					
	1,21,41,61, ETC.			2,5,8,11, ETC.					
	9,29,49,69, ETC.			1,4,7,10, ETC.					
	7,27,47,67, ETC.			3,6,9,12, ETC.					
	12,32,52,72, ETC.			2,5,8,11, ETC.					
	10,30,50,70, ETC.			1,4,7,10, ETC.					
	5,25,45,65, ETC.			3,6,9,12, ETC.					
	20,40,60,80, ETC.			2,5,8,11, ETC.					
	15,35,55,75, ETC.			1,4,7,10, ETC.					
	3,23,43,63, ETC.			3,6,9,12, ETC.					
	18,38,58,78, ETC.			2,5,8,11, ETC.					

QUALITY CONTROL OF THE FIELD ENUMERATION

FORM 60-11-288 (12-4-59)	U.S. DEPARTMENT OF COMMERCE BUREAU OF THE CENSUS	a. OBSERVER <input type="checkbox"/> TECHNICAL OFFICER <input type="checkbox"/> OTHER (Specify position) _____	c. DISTRICT OFFICE d. CREW LEADER e. CREW LEADER DISTRICT f. DATE
F-288 EVALUATION OF MAP REVIEW AND PREPARATORY WORK 1960 CENSUS OF POPULATION AND HOUSING		b. TYPE OF AREA <input type="checkbox"/> MILEAGE AUTHORIZED <input type="checkbox"/> NON-MILEAGE	

INSTRUCTIONS: Fill this form each time you visit a Crew Leader and observe the preparatory work. File forms in the District Office and use them to determine which persons need additional visits.

A. GENERAL PERFORMANCE OF MAP REVIEW AND PREPARATORY WORK

ITEM ON FORM F-236, CREW LEADER'S CHECK LIST FOR MAP REVIEW AND PREPARATORY WORK		RESULTS (Check one)	
ITEM NUMBER	SUBJECT	INSTRUCTIONS FOLLOWED CORRECTLY	INSTRUCTIONS NOT FOLLOWED CORRECTLY (Explain below in Remarks section)
1	MAP FOR EACH ED		
2 OR 3	ORDER OF VISIT		
4a AND 4b	LISTING		
5	ESTIMATING NUMBER OF DWELLINGS IN EACH BLOCK <i>(Non-mileage ED's only)</i>		
6	DIVIDING ASSIGNMENTS <i>(Non-mileage ED's only)</i>		
7	PLACES REQUIRING SPECIAL ENUMERATION PROCEDURES		
8-9	BOUNDARY PROBLEMS		
10	STREET CHANGES		
11	INCORPORATED PLACES NOT SEPARATE ED'S		
12	SEASONAL VACANCIES		

B. REMARKS:

C. ACTION TAKEN:

QUALITY CONTROL FORMS

81

FORM 60-11-289 (12-4-59) F-289 EVALUATION OF FIELD REVIEW FOR PH-1 OR PH-2 1960 CENSUS OF POPULATION AND HOUSING	U.S. DEPARTMENT OF COMMERCE BUREAU OF THE CENSUS	a. OBSERVER <input type="checkbox"/> TECHNICAL OFFICER <input type="checkbox"/> OTHER (Specify position) _____ _____	b. DISTRICT OFFICE c. CREW LEADER OR FIELD REVIEWER d. DATE
--	---	--	---

INSTRUCTIONS: Fill this form each time you visit a Crew Leader or Field Reviewer and observe a field review. File forms in the District Office and use them to determine which people need additional inspection.	e. KIND OF FIELD REVIEW <input type="checkbox"/> FIRST <input type="checkbox"/> INTERMEDIATE <input type="checkbox"/> FINAL
--	--

A. GENERAL CONDUCT OF REVIEW

SECTION OF F-243, RECORD OF FIELD REVIEW	RESULTS (Check one)		
	FIELD REVIEW MADE ACCORDING TO INSTRUCTIONS	FIELD REVIEW MADE BUT NOT COMPLETELY OR CORRECTLY (Explain on back in Remarks section)	FIELD REVIEW NOT MADE
I. COVERAGE CHECK			
II. LISTING BOOK REVIEW			
III. LISTING BOOK REVIEW			
IV. POPULATION REVIEW			
V. HOUSING REVIEW			
LINES 31-36			
VI. FOSDIC BOOK - LISTING BOOK REVIEW			

B. SPECIFIC ITEMS	(Check one)	
	YES	NO (Explain on back in Remarks)
1. Was the F-214 from an earlier review checked to see that errors were corrected?		
2. Were the right pages reviewed in the Listing Book and the Fosdic Book?		
3. Were all errors recorded on F-243, without exception?		
4. Was Enumerator required to fill Form F-214?		
5. Were manual references given when necessary?		
6. Were appropriate entries made in Item 4 of F-236?		
7. Was Column (d) of Item 5 on F-236 completed?		
8. Were differences in dwelling counts in Item 5 of F-236 reconciled?		
9. Was action taken correctly according to Section VII of F-243?		
10. When a subsequent review was required, was the Enumerator given an F-242, Schedule of Field Appointments?		

(Continue on reverse side)

C. REMARKS:

D. ACTION TAKEN:

FORM 60-11-289A (12-29-59)	U.S. DEPARTMENT OF COMMERCE BUREAU OF THE CENSUS	a. OBSERVER <input type="checkbox"/> TECHNICAL OFFICER <input type="checkbox"/> OTHER (Specify position) _____ _____	b. DISTRICT OFFICE c. CREW LEADER OR FIELD REVIEWER d. DATE e. KIND OF FIELD REVIEW <input type="checkbox"/> FIRST <input type="checkbox"/> INTERMEDIATE <input type="checkbox"/> FINAL
F-289A EVALUATION OF FIELD REVIEW FOR PH-3 OR PH-4 1960 CENSUS OF POPULATION AND HOUSING			
INSTRUCTIONS - Complete this form each time you visit a Crew Leader or Field Reviewer and observe a field review. File forms in the District Office and use them to determine which people need additional inspection.			

A. GENERAL CONDUCT OF REVIEW

SECTION OF F-244, RECORD OF FIELD REVIEW	RESULTS (Check one)		
	FIELD REVIEW MADE ACCORDING TO INSTRUCTIONS	FIELD REVIEW MADE BUT NOT COMPLETELY OR CORRECTLY (Explain on back in Remarks section)	FIELD REVIEW NOT MADE
I. LISTING BOOK REVIEW			
II. HOUSEHOLD QUESTIONNAIRE TRANSCRIPTION			
LINES 8 AND 9			
III. ED BOOK REVIEW - HOUSING ITEMS			
IV. ED BOOK REVIEW - POPULATION ITEMS			
V. LISTING BOOK - ED BOOK COMPARISON			
LINES 61-64			
VII. CLOSE OUT REVIEW			

B. SPECIFIC ITEMS

(Check one)		
	YES	NO (Explain on back in Remarks)
1. Were the right pages and units selected to be reviewed?		
2. Were the right pages reviewed in the Listing Book and the ED Book?		
3. Were all errors recorded on F-244, without exception?		
4. Was Enumerator required to fill Form-214?		
5. Was the F-214 from an earlier review checked to see that errors were corrected?		
6. Was action taken correctly according to Section VI of F-244?		
7. When a subsequent review was required, was the Enumerator given an F-242, Schedule of Field Appointments?		

C. REMARKS

D. ACTION TAKEN

<p>FORM 60-11-289B (12-23-59)</p> <p style="text-align: center;">U.S. DEPARTMENT OF COMMERCE BUREAU OF THE CENSUS</p> <p>F-289B EVALUATION OF FIELD REVIEW SINGLE STAGE</p> <p>1960 CENSUS OF POPULATION AND HOUSING</p>	<p>g. OBSERVER</p> <p><input checked="" type="checkbox"/> TECHNICAL OFFICER</p> <p><input type="checkbox"/> OTHER (Specify position)</p> <p>_____</p> <p>_____</p>	<p>b. DISTRICT OFFICE <i>Salina, Kansas</i></p> <p>c. CREW LEADER OR FIELD REVIEWER <i>Mary Harkins</i></p> <p>d. DATE <i>April 4, 1960</i></p> <p>e. KIND OF FIELD REVIEW</p> <p><input checked="" type="checkbox"/> FIRST</p> <p><input type="checkbox"/> INTERMEDIATE</p> <p><input type="checkbox"/> FINAL</p>																																																							
<p>INSTRUCTIONS - Complete this form each time you visit a Crew Leader or Field Reviewer and observe a field review. File forms in the District Office and use them to determine which people need additional inspection.</p>																																																									
<p>A. GENERAL CONDUCT OF REVIEW</p> <table border="1" style="width:100%; border-collapse: collapse;"> <thead> <tr> <th rowspan="2" style="width:40%;">SECTION OF F-243A, RECORD OF FIELD REVIEW</th> <th colspan="3" style="text-align: center;">RESULTS (Check one)</th> </tr> <tr> <th style="width:20%;">FIELD REVIEW MADE ACCORDING TO INSTRUCTIONS</th> <th style="width:20%;">FIELD REVIEW MADE BUT NOT COMPLETELY OR CORRECTLY (Explain below in Remarks section)</th> <th style="width:20%;">FIELD REVIEW NOT MADE</th> </tr> </thead> <tbody> <tr> <td>I. COVERAGE CHECK</td> <td style="text-align: center;">X</td> <td></td> <td></td> </tr> <tr> <td>II. LISTING BOOK REVIEW</td> <td style="text-align: center;">X</td> <td></td> <td></td> </tr> <tr> <td> LINES 10-14</td> <td style="text-align: center;">X</td> <td></td> <td></td> </tr> <tr> <td>III. STAGE I POPULATION REVIEW</td> <td style="text-align: center;">X</td> <td></td> <td></td> </tr> <tr> <td>IV. STAGE I HOUSING REVIEW</td> <td></td> <td style="text-align: center;">X</td> <td></td> </tr> <tr> <td> LINES 32-37</td> <td style="text-align: center;">X</td> <td></td> <td></td> </tr> <tr> <td>V. STAGE I ED BOOK - LISTING BOOK COMPARISON</td> <td style="text-align: center;">X</td> <td></td> <td></td> </tr> <tr> <td>VI. TRANSCRIPTION VERIFICATION</td> <td style="text-align: center;">X</td> <td></td> <td></td> </tr> <tr> <td> LINES 42-46</td> <td style="text-align: center;">X</td> <td></td> <td></td> </tr> <tr> <td>VII. STAGE II HOUSING ITEMS</td> <td style="text-align: center;">X</td> <td></td> <td></td> </tr> <tr> <td>VIII. STAGE II POPULATION ITEMS</td> <td style="text-align: center;">X</td> <td></td> <td></td> </tr> <tr> <td>XI. CLOSE OUT REVIEW (FINAL REVIEW ONLY)</td> <td></td> <td></td> <td></td> </tr> </tbody> </table>			SECTION OF F-243A, RECORD OF FIELD REVIEW	RESULTS (Check one)			FIELD REVIEW MADE ACCORDING TO INSTRUCTIONS	FIELD REVIEW MADE BUT NOT COMPLETELY OR CORRECTLY (Explain below in Remarks section)	FIELD REVIEW NOT MADE	I. COVERAGE CHECK	X			II. LISTING BOOK REVIEW	X			LINES 10-14	X			III. STAGE I POPULATION REVIEW	X			IV. STAGE I HOUSING REVIEW		X		LINES 32-37	X			V. STAGE I ED BOOK - LISTING BOOK COMPARISON	X			VI. TRANSCRIPTION VERIFICATION	X			LINES 42-46	X			VII. STAGE II HOUSING ITEMS	X			VIII. STAGE II POPULATION ITEMS	X			XI. CLOSE OUT REVIEW (FINAL REVIEW ONLY)			
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<p>B. REMARKS</p> <p><i>Section IV Did not check H13 when H7 marked "Vacant"</i></p>																																																									

EXHIBIT 4
(Cont.)

EVALUATION OF FIELD REVIEW - SINGLE-STAGE, F-289B

12/21/59

C. SPECIFIC ITEMS	(Check one)	
	YES	NO (Explain below in Remarks)
1. Was the F-214 from an earlier review checked to see that errors were corrected?		
2. Were the right pages reviewed in the Listing Book and the ED Books?	X	
3. Were all errors recorded on F-243A, without exception?	X	
4. Was Enumerator required to complete a Form F-214?		X
5. Were manual references given when necessary?		X
6. Were appropriate entries made in Item 4 of F-236?	X	
7. Was Column (d) of Item 5 on F-236 completed?	X	
8. Were differences in dwelling counts in Item 5 of F-236 reconciled?	X	
9. Was action taken correctly according to Section X of F-243?	X	
10. When a subsequent review was required, was the Enumerator given an F-242, Schedule of Field Appointments?	X	
D. REMARKS		
<p>4. Had enumerator fill F-214, but did not have her record all the errors</p> <p>5. Manual references never given</p>		
E. ACTION TAKEN		
Retrained on points above. Importance of F-214 explained.		

Appendix B.--CREW LEADER'S MANUAL, STAGE I OF TWO-STAGE AREAS
(Extracts)

Part I General Information

1.0 Introduction

- 1.1 Using the Manual
- 1.2 Crew Leader Appointments
- 1.3 Crew Leader's Job
- 1.4 Crew Leader Activity Calendar

2.0 The 1960 Census

- 2.1 A General View
- 2.2 Census Organization
- 2.3 Confidentiality of Census Data
- 2.4 Plans and Procedures

Part II Preparing for the Census

5.0 Checking ED's Before Enumeration

- 5.1 General
- 5.2 How to Fill Out Form F-236
- 5.3 Instructions for Dividing Enumerator Assignments

Part III Taking the Census

9.0 Enumeration Operations

- 9.4 Field Review
 - 9.41 General
 - 9.42 Frequency of Review
 - 9.43 Where to Conduct the Review
 - 9.44 How to Conduct the Field Review
 - 9.45 How to Use the Results of the Field Review
 - 9.46 The Final Review
 - 9.47 Closeout Review
 - 9.48 Transcription Verification
 - 9.49 How to Make Your Daily Report of Field Review, F-239
- 9.5 Refusals

Appendix E How to Use Form F-243, Record of Field Review

- E1.0 When to Fill Out a Record of Field Review
- E2.0 Completing the Heading of F-243
- E3.0 Recording Appointments for Review
- E4.0 How to Record Errors on the F-243
- E5.0 How to Conduct First, Second, and Third Reviews
- E6.0 How to Conduct the Final Review
- E7.0 How to Conduct the Closeout Review
- E8.0 How to Verify the Transcription
- E9.0 Separate ED's Which are Institutions or Large Group Quarters

CREW LEADER'S MANUAL, STAGE I

91

PART I GENERAL INFORMATION

1.0 **INTRODUCTION.** The role of Crew Leader is important to the Census of Population and Housing. Under the direction of the District Supervisor, you, and the enumerators you supervise will be responsible for collecting complete and accurate population and housing information for your district.

1.1 **Using the Manual.** This manual contains instructions covering all phases of your assignment. It is composed of three parts.

- a. Part I - General information about your job, and an overall look at the 1960 Census.
- b. Part II - Preparatory operations for Stage I of the Census.
- c. Part III - Operations involved in conducting Stage I of the Census.

In addition to this manual you must become thoroughly familiar with the contents of:

- (1) The Enumerator's Reference Manual (Stage I)
- (2) The Crew Leader's Training Guide (Stage I)
- (3) All Crew Leader and enumerator schedules and forms that are used for Stage I.

1.2 **Crew Leader Appointments.** You will receive your official Crew Leader appointment notification on Standard Form 50, "Notice of Personnel Action," within ten days. You will be employed on a temporary appointment which terminates upon completion of your assignment, or at the discretion of the District Supervisor. You will not receive written notice when your appointment is terminated. Your appointment will specify that you will be working on an irregular tour of duty. This means that you are not entitled to earn annual leave, sick leave, overtime or holiday pay. Hours worked on a holiday or in excess of 40 per week will be paid at the regular hourly pay rate.

1.21 **Pay.** You will be paid at a rate of \$15.60 per 8 hour day when actually employed (1.95 per hour), including hours you are in training. Your pay is subject to income withholding taxes and Social Security deductions.

1.22 **Hours.** Except for the training period you will have no regular hours of duty. However, you must work such hours as are necessary to complete your assignments. This means that there will be work in the evenings and on Saturdays. Generally you will not work on Sundays or holidays.

1.3 **The Crew Leader's Job.** It is your primary responsibility that the enumeration in your district be carried out accurately and rapidly. To accomplish this you will be involved in a variety of activities and will deal with many people. These activities are outlined in the following Crew Leader Activity Calendar.

1.4 Crew Leader Activity Calendar

Enter on Duty.....	March 9 or 14
Receive Preparatory Training.....	March 9 or 14
Begin Recruiting, Testing and Selecting Enumerators.....	March 10 or 15
Begin ED Preparatory Check, T-Night, M-Night, Institution and Group Quarter Listings.....	March 10 or 15
Begin Recruiting Progress Reports.....	March 14 or 17
Begin Securing Enumerator Training Space.....	March 16
Receive Technical Training.....	March 16-18 or March 22-24
Report Address of Enumerator Training Space.....	March 17 or 21 or 24
Begin Preparation of Enumerators' Assignments and Materials.....	March 19 or 25
Train Enumerators.....	March 28, 29 and 30
Report Number of Enumerators that Reported for Training.....	March 28 or 29
Report Name, Address and Telephone Number of the Enumerator Selected to be Field Reviewer.....	March 28 or 29
Report Number of Enumerators that Completed Training and Were Given EA's.....	March 30 or 31
Train T-Night Enumerators (If applicable).....	March 31

T-Night Enumeration (if applicable).....	March 31
Begin Induction of Enumerators.....	March 31 and April 1
Stage I Enumeration Begins.....	April 1
Begin Field Reviews.....	April 2
Begin Progress Reporting.....	April 4
Begin Mailing Completed Stage I ED Books to District Office.....	As accepted
Recommend Enumerators for Stage II.....	April 11
Complete Stage I Assignment.....	April 13
Stage I Close-out meeting.....	As assignment is completed or April 18

2.0 THE 1960 CENSUS

2.1 A General View

2.11 **History.** Article I of the Constitution of the United States provides that a census of population be conducted every 10 years. The first census in 1790 enumerated the number of inhabitants in each State and a few facts about them. The 18th Decennial Census, starting April 1, 1960, will cover such population characteristics as age, sex, occupation, educational attainment and income. It will also collect information about such housing characteristics as kind, condition and value of homes, both occupied and vacant, and facilities and equipment in the home.

2.12 **Authority.** The 1960 Census of Population and Housing is authorized by the Census Act approved by Congress August 1954 (Amended August 1957). Excerpts from this Act are in Appendix F of the "Enumerator's Reference Manual." It states that each adult person is required to supply information to the best of his knowledge.

2.13 **Value of Census Information.** The 1960 Census of Population and Housing will provide a comprehensive inventory of the Nation's people and their homes. A great many uses are made of this basic census information. For example:

- a. The census is the basis on which the number of members of the House of Representatives for each State is determined.
- b. State legislatures apportion the representation in State legislative bodies among the counties and groups of counties.
- c. Large amounts of money are paid by the Federal Government to the States and by State Governments to cities and counties on the basis of population counts.
- d. Cities and towns determine the need for expansion of public services, utilities and schools.
- e. Government and private agencies analyze the characteristics and location of the labor force, occupational skills, extent of unemployment, sources of new workers, etc.
- f. Businessmen determine where and how much of their product they can sell, and measure other features of their market.
- g. The quality of our housing supply and the areas where housing is most needed are determined.
- h. By a comparison of the 1960 census data with those of previous censuses, changes in the characteristics and geographical distribution of our population are analyzed.

2.2 Census Organization

2.21 **Organization of Personnel.** To conduct the day to day work of the Bureau of the Census, a permanent staff of census employees is located in Washington, D.C., and in 17 Regional Offices throughout the United States. The primary function of this staff during the 1960 Census is to plan the collection of information, instruct the temporary force for the Census, and supervise the census operations.

Since the permanent staff is too small to collect the information about an estimated 180,000,000 people and

QUALITY CONTROL OF THE FIELD ENUMERATION

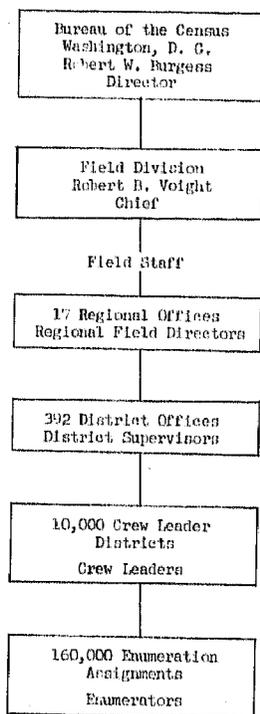
61,000,000 homes in the United States, a temporary staff will be employed during the enumeration period of the 1960 Census. This staff will operate from 392 temporary Census District Offices, each headed by a District Supervisor.

In these offices 10,000 Crew Leaders will be employed to train and supervise 160,000 enumerators.

- 2.22 Geographic Organization. To insure complete coverage for the census, the United States has been divided geographically into approximately 270,000 enumeration districts, commonly called "ED's." An ED can constitute the assignment of one enumerator. However, in many instances, two or more ED's will be combined into one enumerator's assignment called an "EA."

In urban areas where people live close together, ED's generally consist of groups of city blocks. In rural areas, where the population is more scattered, ED's may consist of large land areas such as a township. Large apartment buildings, large institutions, hospitals, military installations and prisons are usually separate ED's. When the returns from all these ED's are totaled, we shall have complete census information for every city, county, and State in the Nation.

- 2.23 Organization Chart. The Field organization for the 1960 Census of Population and Housing is illustrated below.



2.3 Confidentiality of Census Data

- 2.31 Census Law. The basic law under which the Bureau of the Census operates prohibits employees from revealing, orally or by exhibit of records, any information contained in any schedule or report obtained from individual respondents to anyone except authorized census employees. The Census Oath of Office places a legal restraint upon the employee to guard and keep these records confidential. Only publications in summary form may properly be released.

- 2.32 Census Rules. The following rules must be followed regarding unpublished information:

- a. All schedules revealing data concerning individual respondents must be kept out of public view.
- b. Crew Leaders as well as enumerators must keep schedules in their possession protected and confidential. It is important that they understand that:
 - (1) They may be prosecuted for unauthorized disclosures, even if such disclosures are made after their employment with the Census Bureau has ended.
 - (2) They must not assign any part of their work to any unauthorized person.
 - (3) With the exception of interpreters and guides, only sworn census employees may accompany an enumerator while at work.

- (4) Schedules must not be placed where unauthorized persons will have access to them.
- (5) Schedules completed by an enumerator must not be examined by other census enumerators or employees except those having official reason for doing so.
- (6) Enumerators may not discuss census information obtained for particular individuals with other census enumerators or employees, except when there is official reason to do so.
- (7) Enumerators are forbidden to enter upon the schedule the name of any fictitious person or to make any fictitious or untruthful statement concerning any person or place enumerated.

2.4 Plans and Procedures.

- 2.41 Development of Plans and Procedures. The Census Bureau is responsible for developing plans and procedures which will:

- a. Provide summary statistical data of value to the Nation.
- b. Insure maintenance of the traditionally high standards of accuracy and reliability of census statistics.
- c. Minimize the cost of the census to the government and to the taxpayer.

The Census Bureau started intensive work on these problems early in 1957. It consulted groups in government, business, farming, labor and other fields to find out precisely what kinds of information were most needed. After the information to be obtained was decided upon, attention was directed to the best methods of obtaining it. The Bureau tested many types of forms in different parts of the country, asked the same questions in different ways, and determined the cost and effectiveness of each procedure. The 1960 Census, as you will conduct it, is the outcome of this comprehensive program.

- 2.42 Enumeration Plans. For most of the population, the 1960 Census will be conducted in two stages. In Stage I answers to a limited number of population and housing questions will be obtained from every household. A Household Questionnaire asking additional population and housing questions will be left at one household in four to be completed by the respondent and mailed to the Census District Office. Stage II is the operation of obtaining complete answers to these additional questions.

For part of the Nation, generally areas with low density of population, these two operations will be combined and the Census will be conducted in a single stage operation. This manual is concerned only with Stage I of the two-stage operation.

- 2.43 Stage I. On April 1, 1960, the Census Day throughout the United States, Stage I enumerators will start collecting the population and housing information. Every person from the one-day old infant to the oldest inhabitant alive on the Census Day must be enumerated. To get housing information, all places where people live or could live (in census terms each "housing unit") must be enumerated. Even though a housing unit is vacant it still must be enumerated.

The Stage I enumeration questions about people will in general be limited to name, relationship, age, sex, race and marital status. Stage I questions on housing will include questions on number of rooms, water supply, bath and toilet facilities, tenure, vacancies, and in many areas, value or monthly rent.

An advance questionnaire, called the Advance Census Report, containing these questions will be distributed to each household by the Post Office about a week before the enumeration begins. Experience has shown that accurate census information can be collected more quickly and easily if the Advance Census Report is filled out by the household before the enumerator calls.

- 2.44 Stage II. On April 20, about one-third of the enumerators who worked during Stage I will start collecting additional information about persons and housing. The additional information about persons will include inquiries on place of birth, residence five years ago, education, employment, occupation, income and other items. Additional housing information will include inquiries on heating equipment, cooking fuel used, year built, number of bedrooms and bathrooms, electric appliances, automobiles and others. This second stage enumeration will cover the 25 percent sample housing units and persons who live in them. The Stage II enumerator will complete the required information either by transcribing from the mailed-in Household Questionnaire to his census schedules, or by obtaining any missing information by telephone or personal visit so that all information for the sample housing units and persons who live in them in his assignment are accounted for.

The second stage, or sample enumeration, cannot begin in an ED until the first stage enumeration of that ED has been completed. It is essential, therefore, that the first stage be completed on schedule.

2.45 General Procedures - Stage I. To get information accurately and quickly, the enumerator must follow an exact procedure. Generally, the steps in this procedure for Stage I are:

- a. Canvassing - Covering every part of the ED systematically so that no housing unit or person is overlooked.
- b. Listing - Recording in a "Listing Book" the address of each housing unit, the name of the head of the household and the number of persons in each occupied housing unit. Vacant housing units will also be identified in the Listing Book.
- c. Sampling - Designating the proper sample units, one household in every four, by assigning to each a sample key letter.
- d. Interviewing - Picking up the Advance Census Report and copying the information from it to the permanent census schedule (PH-1 or PH-2). When necessary, asking the respondent the census questions, and recording them directly on the permanent schedule. A "schedule" is simply a form used to record the answers to census questions. For convenience, schedules are bound together into a book sometimes called an enumeration book, ED book, schedule book or FGEDIG book. The Household Questionnaire is left with the respondent at one housing unit in four with the request that it be filled out and mailed to the Census District Office. The Household Questionnaire contains the sample questions for Stage II.
- e. Followups - Callbacks are to be made at housing units where no one was at home at the time of the first call, or when, for any reason, interviews could not be completed.
- f. Transcribing - Copying identifying information from the Stage I enumeration book into the sample schedule (Stage II) book. The sample schedules will be used by the Stage II enumerators for recording or transcribing answers to the sample questions.

2.46 General Procedures - Stage II. Briefly the steps for the Stage II procedures are:

- a. Arranging Household Questionnaires - Arranged by Stage I ED book page and line number for easy transcription and checking.
- b. Transcribing - Editing and transcribing Household Questionnaire entries into the sample schedule book.
- c. Telephone Followup - Calling sample households for data which they failed to report on their Household Questionnaire, or to correct inconsistencies or errors they made in their replies.
- d. Field Followup - Personal visits to households that did not mail in their questionnaire or those with an incomplete questionnaire that have no phone, or where telephoning is not advisable such as a lodging or boarding house.

2.47 Special Procedures. Special procedures will be used for the enumeration of large institutions (hospitals, prisons, sanitariums, colleges, military installations and similar places), for hotels having accommodations for 50 or more transients, and for motels or tourist courts having 50 or more units or rooms for transient guests, and for motels or tourist courts having 50 or more rooms or units for transient guests. These procedures are outlined in other sections of this manual.

5.0 CHECKING ED'S BEFORE ENUMERATION

5.1 General. Between now and the time you train your enumerators, you must inspect each enumeration district assigned to you.

The reasons for checking each ED before the actual enumeration begins are to:

- a. See that the map or description of the ED is correct so that the enumerator will be able to find his way around his area easily.
- b. Mark the maps so that the enumerator will know where to start and what direction to follow during enumeration.
- c. Specify the order in which he will visit his ED's and each of the blocks or first three road segments within his ED's.
- d. Verify that the number of dwellings in each enumerator's area is small enough so that the enumerator can finish his job on time.
- e. Locate any places such as institutions, hospitals and large hotels or motels which will require special enumeration procedures.
- f. Make a partial list of dwellings which you will use later to check whether the enumerator is missing any places which should be enumerated.

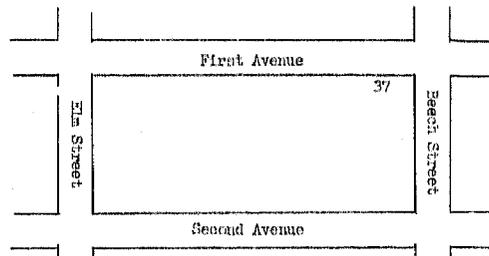
To help you accomplish all of these things in a systematic fashion, you will fill out a Form F-236, "Crew Leader's Check List for Map Review and Preparatory Work" (appendix B) for each enumeration assignment. This check list will take care of most of the situations you encounter. However, occasionally you will run into problems which will require some ingenuity on your part. In handling such situations, keep in mind that the main reason for checking the area ahead of time is to discover problems the enumerator may run into, so that you will be able to tell him how to cover his ED most effectively. Whenever you meet with some problem which is not covered by the Check List, use the Remarks section on page 2 to describe the problem and what the enumerator will have to do to take care of it.

For example, if a new limited access highway, not shown on the map, cuts through an ED, you may need to tell the enumerator to cover everything on one side of the highway before attempting to canvass any part of the other side.

Each day send the Check Lists you have completed to the District Office to be reviewed by the Technical Officer. Enclose any sketches or descriptions that you have made, and list these enclosures in item e on the front of the F-236. You will be able, on the average, to check approximately six EA's in an eight-hour day.

5.2 How to fill out Form F-236

- 5.21 Items a Through d. Fill out items a through d when you start each enumerator assignment (EA). Form F-237, (exhibit 3), which is your record of enumerator assignments, will tell you whether or not an enumerator will be paid for mileage. Refer to this form when you fill out item d. If there are both mileage and non-mileage ED's in the same enumerator assignment, fill out a separate check list for the mileage ED's. Enter at (b) the number of each ED included on the F-236. This information also comes from the F-237.
- 5.22 Item e. When you finish checking the EA, list separately each sketch or description which you are sending in with the check list.
- 5.23 Item f. Before you mail the check list and attachments to the District Office sign the certification and enter the date.
- 5.24 Item 1. Follow the instructions on the checklist. If an ED is an institution, hospital, hotel, etc., fill out item 7 only of the check list for that ED.
- 5.25 Item 2A. Item 2A applies only to non-mileage areas. Most non-mileage enumerators will be in cities and towns which are laid out in blocks, as in the following illustration:



Blocks may not always be laid out quite as regularly as in the illustration shown above; some blocks may be triangular; some may be oval-shaped. Some blocks may be broken up by dead-end courts, alleys and service roads.

The blocks in large urban places will be numbered on the ED maps. In such places, list the block numbers on the map backing sheet, in the order in which the enumerator must visit them.

Blocks in smaller cities and towns are not always numbered on the maps. In such places, number the blocks on the map yourself in ordinary pencil. Start with number "1" in each ED and number the blocks in the order in which the enumerator must visit them.

Try to number blocks in such a way that the enumerator will be able to cover his area with a minimum of travel. On maps which show block numbers list them in the order in which the enumerator must visit them so that he will do as little traveling as possible.

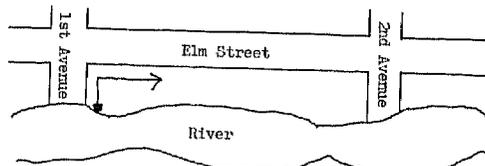
- 5.26 Item 2B. Item 2B also applies only to non-mileage areas. Mark the first two blocks in each ED to show enumerators where to start and in which direction to enumerate. Wherever possible, put the starting point in the upper left (northwest) corner of the first two blocks and draw an arrow to show the direction of

QUALITY CONTROL OF THE FIELD ENUMERATION

travel as in the illustration below:



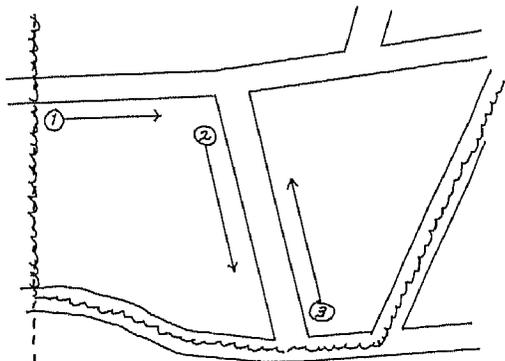
Occasionally you will find blocks which are more conveniently started at some other point. In the illustration below, it would be more reasonable to start in the lower left corner.



If you discover any such blocks in an ED, mark them appropriately, even if they are not the first two blocks.

- 5.27 **Item 3.** Most mileage enumerators will be in areas which are not laid out in blocks. In such areas, the enumerator will canvass road by road. Generally, he will cover both sides of a road as he goes, except for ED boundary roads. Mark each ED map with a starting point. Then mark the first three roads the enumerator must visit with an "arrow-road number." This number is called the "arrow-road number" because you combine it with an arrow  to show the direction of travel for the enumerator. If the area is quite built up, or the road is a busy highway, you may want to tell the enumerator that he should canvass each side separately. In this case, assign a different arrow-road number to each side of the road to show the direction of travel on each side.

Illustration for marking rural arrow road numbers on the map.



In mileage areas which are laid out in blocks, follow the same procedure used for non-mileage areas (Item 28).

- 5.28 **Items 4A and 4B.** One of the enumerator's most important responsibilities will be to find all occupied and vacant dwellings in his assigned area. If he fails to do this, we will not have a complete census. To check on whether he is finding all the dwellings, we are asking you to list the addresses of some dwellings in his area to compare later with those listed by the enumerator.

By "dwellings" we mean places occupied by one family, or if vacant, intended for occupancy by one family.

Such as:

1. House occupied by one family.
2. Apartment
3. Each part of a house which has been divided into several apartments.
4. Living quarters above or behind stores or other commercial places.
5. Apartments or rooms above garages.
6. Trailers, if occupied.

We are using the term "dwelling" now. When you receive your technical training, we shall use the term "housing unit" and give it a more precise definition.

In non-mileage areas, list the first 25 dwellings in the assignment. In mileage areas, list along the first three roads, in the order specified by the arrow-road

numbers, until you have listed 15 dwellings or have covered the first three roads without finding 15. In sparsely populated areas do not drive more than 15 miles per EA to make the preliminary listing called for in items 4A and 4B. Then, in both mileage and non-mileage areas, list in Item 4B an additional 10 dwellings, of your own choosing, scattered throughout the remainder of the assignment. Use a separate line of Item 4A and 4B for each dwelling which you list.

Enter the ED number in column (a). In column (b) enter the block number or arrow-road number of the place where you begin prelisting. When you come to a new ED in column (a), or a new block in column (b), draw a line across the column to show where the old one ends.

Enter the street name or arrow road number in column (c). Use ditto marks in column (c) if the street name does not change. In column (d), enter the house number or rural box number of each dwelling you list. If there is no box number in a rural area, enter a brief description of the dwelling and its location from the nearest intersection. Enter name of family if you can determine it easily; for example, from mail box identification.

Example:

one story-brick (Jones). 1/4 mile north of Rt. 16.

Enter apartment numbers or location of apartments in column e. Leave columns (f), (g), (h), and (i) blank. You will use them later when you check your enumerator's work.

There is a very important reason why you should be careful to get a complete and accurate listing of dwellings. If an enumerator should miss more than 2 or 3 dwellings you have listed, you will have to re-lease him. You would not want to take such action unless you were certain that the dwellings he missed were ones that he should have enumerated.

If you encounter stores, warehouses, etc., while listing, find out if anyone lives upstairs or in back. Inquire at other places when you are in doubt about whether the place is a dwelling.

- 5.29 **Item 5.** If it turns out that an assignment is too large for one enumerator, you will have to divide it among two or more. You will do this in non-mileage assignments by estimating the number of dwellings in each ED, block by block. There are six pages for item 5 in the check list. Use one page for each ED. If you have more than six ED's in the assignment, use additional check lists as necessary.

Before you visit the ED, fill in column (a) and (b) of Item 5. Enter each block number and the names of all boundary and internal streets for the block, as shown on your map. Be sure to follow the block sequence of enumeration which you have marked for the enumerator. Generally, you will enter four street names in column (b) for each block, but occasionally a block may contain more or less than four streets.

Drive around the blocks in the ED, or walk if the area is too congested, and estimate the number of dwellings in each block by making a rough count. (If you are in an area which has large apartment houses, you may not be able to tell how many units are in the structure from the outside.) Enter this number in column (c). In some cases, you want to record several numbers in column (c), so as not to lose count. For example, if you have counted 76 dwellings and you are only halfway around the block, you may want to record the 76 in column (c) immediately, and enter the remaining count later on.

Leave column (d) and the remarks section at the bottom of the page blank. You will use these later to compare the enumerator's count with your estimate and to explain cases where the number of units listed by the enumerator differs significantly.

When you have gone around all blocks, enter the total number of dwellings in each ED in the total boxes at the bottom of the page.

5.210 **Item 6.** Enter from Item 5 the Grand Total of dwellings for each ED. Then get the total for all ED's. This is your estimate of the number of units in the assignment.

- 5.3 **Instructions for Dividing Enumerator Assignments.** If you have estimated that there are 500 or more dwellings in the assignment, you must divide it between two (or more) enumerators. Divide the assignment by grouping the ED's to form two (or more) assignments of approximately the same size. Although it would be desirable to assign adjacent ED's to one enumerator, this may not be possible always.

If the assignment has two or more ED's, see if you can divide the work by re-grouping whole ED's. For example, suppose the assignment consists of ED9-5N with 150 dwellings, 9-5P with 400 dwellings and 9-5R with 300 dwellings. You would divide

this assignment between two enumerators by giving one of them ED's 9-5N and 9-5R. You would give the other enumerator 9-5P even though 9-5N and 9-5R were not adjacent to each other.

When you divide an assignment you must note this on your F-237 by changing the original brackets to indicate the new assignments.

You should avoid splitting an ED if possible. However, it may sometimes be necessary to do so. Keep the same ED number for each part, but assign each part a different letter suffix, beginning with "A". For example, if you split ED 61-12, you would have 61-12A and 61-12B. Or, if you split ED 61-27P, you would have 61-27PA and 61-27PB. Send to the District Office, together with your F-236, a sketch or description of how you have split the ED, giving the new ED numbers and the boundaries. Try to split ED's along boundaries which can be determined readily, such as major streets or roads.

Under no circumstances should you change an existing ED boundary line.

As an example, suppose an assignment consists of ED's 9-13N with 200 dwellings and 9-13P with 650 dwellings. In such a case, you might split 9-13P into 9-13PA with about 400 dwellings and 9-13PB with about 250 dwellings. This would permit you to assign 9-13N and 9-13PA to one enumerator, and 9-13PB to another.

When you split an ED, you must enter the new ED numbers on your F-237. The "Authorized Rates" columns (b), (c), and (d), "Sample Key Start", columns (e) and "Schedule Type Code", column (f), are the same for the new ED's as they were for the original.

When EA's must be divided, prepare maps for enumerators by drawing a sketch of the ED's to be assigned another enumerator. This can, in some instances, be done rather neatly by putting the old map on a window pane with a sheet of paper on top. The light through the window will permit you to trace the original map. Then cross out on the original map that portion which will be reassigned.

It will not be necessary to prepare a checklist for the new assignment. Simply note on the front cover of the present checklist that it applies to more than one assignment.

5.31 Item 7. In making your estimate of the number of units in the enumerator's assignment, you may find "special places" which are not to be enumerated in the usual way. These include places such as hospitals, college dormitories, hotels, jails, convents, homes for the aged, orphanages, etc., which will be enumerated by special enumeration procedure. If there is a college or university in the EA, find out whether the students will be on vacation at any time between April 1 and April 15. Enter the date when the college resumes classes in the Remarks section on page 2 of the F-236. Instructions for enumerating such places are in Section 6.0 of this Manual. If you are at all in doubt, list the place in Item 7, as well as those you know will be covered by special enumeration procedure. Appendix C is a list of places which are classified as institutions and hospitals.

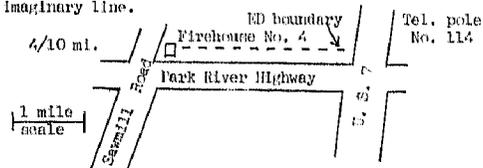
- a. If you list a place in Item 7 which should be made a separate ED, enter the ED number in column (g). For example, the Crew Leader in ED 30-25N found that the York Hotel has 75 rooms for transient guests. Therefore, he made the York Hotel ED-30-25NB and the balance of the ED became 30-25NA. The Crew Leader entered York Hotel in column (a), 75 in column (b), and 30-25NB in column (g).
- b. If you divide an EA for any reason, correct the F-237.
- c. Use column (p) of your F-237 to remind you to instruct enumerators not to enumerate separate ED's such as T-night places ("M" for transient places such as large hotels and motels) and large institutions which will be handled by special procedure (See Section 6.0). Keep in mind that M-night places ("M" for missions, flophouses, jails, etc.) will be enumerated during Stage II and are not to be assigned for Stage I enumeration. Use column (p) also to remind you that there may be places in an enumerator's assignment which have to be enumerated by special procedure even though they are not large enough to be made separate ED's.
- d. Before you send the F-236 to the District Office, see that you have entered on the appropriate forms F-269, "Places Requiring Special Enumeration Procedures," (Exhibit 12), all places listed in Item 7 which you make separate ED's. Exhibit 12 shows how form F-269 is to be filled out. Note that a separate form must be prepared for each type of place listed in item D. Some of you will receive forms which were prepared in advance by the office. Make any necessary additions to these forms if you find places which were not listed in advance.

- e. When you finish making your ED check and have completed all your F-236 forms, send the F-269 forms for M-night places only to the District Office (See Section 6.0). These are to be assigned for Stage II enumeration.

You may receive a set of forms 1-36, Institution Information (Exhibit 13), for institutions in your crew leader district which are to be enumerated by special procedure. These are places which are too small to be separate ED's. Give these cards to enumerators in whose assignment areas these institutions are located as a reminder that they are to enumerate them by special procedure. Note in column (p) of the F-237, that there are cards for that ED.

- 5.32 **Item 8.** For item 8, locate each of the ED boundaries shown on the map. If the physical features of the boundaries have changed, check YES. Make a sketch or write a description of the difference and send it in with the check list. If there have been no boundary changes, check NO.
- 5.33 **Item 9.** In most cases, the ED boundaries will be streets, roads, rivers or other clearly visible features. In some cases a boundary may not be visible on the ground because it is an imaginary line, a political line, etc. If one or more of the boundaries are not visible, check YES and make notes to help the enumerator identify and locate the boundary. These notations may be house numbers, fire hydrants, telephone pole aerial numbers, permanent landmarks, etc., or a more detailed description of the location. Later on, you will enter these notes on the ED Listing Book to help the enumerator during enumeration.

In the following example you might show the location of the firehouse and telephone pole to help the enumerator identify the boundary which in this case is an imaginary line.



- 5.34 **Item 10.** Check carefully for street name changes, new streets, and other changes in the physical characteristics of the EA. Do this as you travel around each block to estimate the number of dwellings. If there are no changes, check NO. If there are changes, check YES, and correct your map and the enumerator's map. Do this carefully and neatly so the enumerator will be able to understand your changes.

If many changes have taken place in the area since the map was made, try to get up-to-date maps of the area from the local city or county government. Keep one copy for the enumerator and send another copy in with the F-236. Instruct the enumerator to keep within the boundaries shown on the Census map. Draw these boundaries on the new map for him. Be sure the original map is returned.

- 5.35 **Item 11.** If any part of the EA is an incorporated place which is not a separate ED, you must arrange to get three copies of a map of that place as early as possible. Have these copies of the map certified by the mayor, town engineer or other responsible local officials. The certification should be entered directly on the face of the map as follows:

"I hereby certify that the boundaries on the map of this city are true and correct as of (date) 1960." Signed

John Doe
Town Engineer

Draw the boundaries of the ED shown on the original map on each of the three certified copies. Send two copies to the District Office attached to the Check List, F-236, for the EA. Keep the third copy for enumerators who will be working in the incorporated place.

- 5.36 **Item 12.** If the EA you are checking is in a resort area, there may be a number of dwellings which are used during part of the year only; for example, cabins which are rented to campers or persons on vacation. If there are fifty or more of such vacant, seasonal places in any one of the ED's in the EA you are checking, assign such ED's on a hourly rate. Correct your Form F-237 if you do this by checking column (d) and explaining in Remarks column.

9.4 Field Review

- 9.41 General. The purpose of the field review is to insure that the information collected by the enumerators is accurate and complete. The best way to do this is to find out as quickly as possible how well each enumerator is doing his job by inspecting the work he has completed. Since he has been trained in many different things, you may find during the course of review that errors result from an enumerator's failing to remember or to understand some portion of the instructions. For this reason, you must not only locate errors but must show the enumerator how to avoid such errors in the future.

All work coming from your district will be inspected in the District Office. If enumerators know how you select housing units for review, they may tend to be particularly careful with those units and you may accept work occasionally which will be returned by the District Office for further enumeration.

If an EA is returned to you from the District Office for correction, review the entire assignment for errors. First, see that the Listing Book agrees with the ED Books; particularly with respect to sample key letter. Next, check all ED books for omissions, bad FOSDIG marks and double marks. Then make all necessary corrections in the Stage II ED Books. When you are satisfied that the ED Books are acceptable, return them to the District Office together with the Listing Book.

- 9.42 Frequency of Review. Each enumerator will receive at least two reviews; a first review as soon as practicable after the beginning of enumeration, and a final review when his assignment is completed. Schedule one or more additional reviews if the results of the first review show that the enumerator needs further supervision and training. Although the average review will take less than one hour, schedule the first two reviews you and the Field Reviewer make for 1 1/2 hours each; you will need a little extra time until you become familiar with the procedure. See paragraph E3.0 of Appendix E for more detailed instructions on scheduling appointments.

The Field Reviewer will make twice as many first reviews as the crew leader on April 2 and 4. This is so that the crew leader will be able to spend additional time during the first few days with any persons who require retraining as well as to give the crew leader time to take care of his other administrative duties. As far as possible schedule appointments first with your weaker enumerators.

It is important that you and the Field Reviewer make every effort to review the work of every enumerator in your area on April 2 and 4. Since no review appointments will be scheduled on April 1, in order to give enumerators time to complete enough work to make the first review worthwhile, a number of them may have completed as much as one-fourth of their assignment before they come in for the first review. When you schedule the first field review with an enumerator, enter the date, time and place in Section B of the same F-242 which tells him where to report for induction. (Exhibit 21).

- 9.43 Where to Conduct the Review. In order to review the work of as many enumerators as possible, instruct enumerators to meet you and the Field Reviewer at some central location, whenever possible. Try to get the use of free space in places such as schools, churches, office buildings, fire houses, YMCA's, civic centers, court houses, veteran's organizations, lodges, etc. As a last resort, you may use your home, provided this is agreeable to you and your enumerators. If your crew leader district is such that none of your enumerators need travel very far to reach the field review location, you may find it helpful for both you and the Field Reviewer to work at the same location. However, if your district covers a large area, you would do well to find a separate location for the Field Reviewer in order to cut down an enumerator travel.

9.44 How to Conduct the Field Review

- a. The Enumerator's Record of Errors, F-214 (Exhibit 22)
Before you start the first review give the enumerator a blank F-214. Instruct him to write his name in the space provided on the upper right-hand corner of the form and to read carefully the instructions for using the form. Answer any questions on the instructions that he may have.

At each review have the enumerator record on his form F-214 the errors you find in his work. When you find an error, be sure that you describe it to the enumerator in enough detail so that he understands it and can locate the item later. Check to see that the enumerator is recording all his errors correctly.

If time permits during the review, retrain the enumerator on his weak points. If you do not have time, try to arrange a meeting as soon as possible for such additional training.

At the end of each review instruct the enumerator to correct all the errors found during that review.

Tell him to check the unreviewed portion of his work for errors of the type recorded on his F-214. These errors must be corrected also.

At the beginning of each review following the first, see that the errors on the F-214 from the previous review have been corrected. Check the entries themselves—do not assume that errors were corrected because the enumerator's initials appear in the last column of the form. If errors were made in enumerating sample housing units or persons in GQ's, be sure that the corrections are carried over to the units transcribed to the Stage II ED Book. If he runs out of space, give him another form.

Collect all Forms F-214 from the enumerator when his assignment is accepted as complete. After the transcription verification send these forms to the District Office along with the Listing Book, ED Books, F-243 and other materials.

b. Types of Errors You Will Find

- (1) Failure to list a housing unit is a very serious error. If the enumerator has not listed the unit and, therefore, has not enumerated it, the population count for that area as well as the information will be incorrect.
- (2) Omission of entries (blanks) in items that require entries.
- (3) Double marks result from filling more than one circle in an ED Book item.
- (4) Bad FOSDIG marks are marks that are too light or do not fill the circle completely. Such marks are the same as omissions.
- (5) Incorrect order of enumeration. Certain entries are required to be in a specified order. For example, sample key, block numbers, and page numbers.
- (6) Lack of agreement between ED Book and Listing Book. For example, if the number of persons in the Listing Book is different from the number of persons shown in the ED Book for the same unit, it is an error.
- (7) Inconsistent Entries. For example, if a person was born in March 1953, he cannot be marked "divorced" in item P7 since he is only 7 years old.
- (8) Unnecessary entries. Do not count as an error any entry in an item when no entry is required. For example, an entry is unnecessary in item HL3 when the housing unit is occupied. If there is such an entry in HL3, do not tally it as an error but merely caution the enumerator against wasting time making entries that are not required.

c. How to use the F-243, Record of Field Review (Exhibit 23)

When you make a review of an enumerator's work, you will use a form F-243 which tells you how to select the items to be reviewed and what action to take when you find errors.

Detailed instructions for the use of this form are to be found in Appendix E of this manual. When you check for missed units in Section I of the F-243, you will refer to the F-236, Crew Leader's Check List for Map Review and Preparatory Work, which you completed before enumeration. Note: Be sure your Field Reviewer has the F-236 Check Lists for the enumerators with whom he has appointments.

When you make the checks in Sections IV and V of the F-243, examine the ED Books as if you were an enumerator conducting an interview. Review all population and housing items on one page at a time. Use the F-243 to record the errors you find. However, until you become thoroughly familiar with the F-243, treat the Record of Field Review as a check list of the items to be reviewed.

- 9.45 How to use the Results of the Field Review. After you review the enumerator's work, you will decide on the basis of the errors he has made whether:

- (1) He can continue to work without further review.
- (2) He must be given additional help and training.
- (3) He must be released because his work is not acceptable.

a. How to terminate an enumerator's appointment.

Any enumerator should be released if it is quite clear to you that he is doing poor work and it is unlikely that the quality of his work will improve. Keep in mind that permitting such an enumerator to remain on the job can result in lowering the overall quality of the work coming from your district.

Only the Crew Leader may release an enumerator. Field Reviewers should recommend the release of an enumerator for the reasons shown above; however, a Field Reviewer has no authority to do so on his own initiative.

If you release an enumerator and reassign his work to another person, be sure to show this change on Your F-237, Crew Leader Record of Assignment.

- (1) If the Crew Leader makes the review, he will complete the payroll form with the enumerator and submit it to the District Office.
- (2) When the Field Reviewer recommends release, he will not complete the payroll form. He will schedule a meeting for the enumerator with the Crew Leader, who will notify the enumerator of his release. The Crew Leader will complete the payroll form at that time.
- (3) All Census materials in the possession of the enumerator will be collected. Be sure to collect the enumerator's official identification as well as the ED and Listing Books, EA map, and other Government property. The Crew Leader should have the Listing Book (with the payroll form) and the Record of Field Review when he meets the enumerator to confirm the release action.

If the released enumerator does not have all the materials with him, the Crew Leader should arrange to pick them up.

Do not submit the payroll form until you have recovered all Census property from the released enumerator. If necessary, inform the enumerator that he cannot be paid until he has turned in all Census materials in his possession.

- (4) When you must complete a payroll form before an EA is completed insert a duplicate payroll form in the Listing Book for the enumerator who completes the assignment.

b. How to Tell an Enumerator He is Released.

You are required by the Census Bureau to release enumerators who do not do acceptable work. When the Crew Leader releases an enumerator he should make it clear that he is carrying out Census Bureau instructions. Below is a statement that the Crew Leader will use as a model when he releases an enumerator.

"The Record of Field Review shows you have made more than the allowable number of errors. According to Census Bureau procedure I am not permitted to let you continue enumerating."

Thank the enumerator and assure him that he will be paid for all acceptable work he has done up to this point.

9.46 The Final Review

a. If at the final review, the EA is accepted as complete:

- (1) See that all errors on the F-214, Enumerator's Record of Errors have been corrected.
- (2) See that any units missed by the enumerator according to your F-236, Crew Leader's Check List for Map Review and Preparatory Work, have been entered in the ED and Listing Books.
- (3) Complete the payroll forms with the enumerator. Tell the enumerator that payment for transcription work will depend on whether the work passes inspection.

b. If the EA is not acceptable, instruct the enumerator to go over his work and correct the errors found during review and all similar errors. When he returns the EA, check to see that he has corrected the errors noted on the F-214.

c. A review of all ED Books will also be made in the District Office to insure that field review activities are being carried out effectively. Work that fails to pass field review will, in all likelihood, also fail the office review and these ED's will be sent back to you to be corrected and completed so that they are acceptable.

9.47 Closeout Review

If an enumerator completes a housing unit by closeout procedure, he may not get the minimum information required by the Census Bureau. A review of such cases must be made after the payroll computation for each EA according to the instructions in paragraph E 7.0 in Appendix E. Since the enumerator will not be present for this review, do this operation as time permits, between field review appointments.

If you find during the closeout review, that the assignment needs further work, assign the books to one of the better enumerators (or the Field Reviewer) who is available for such work. Keep track of such an assignment on your F-237.

- a. Assign closeout work on an hourly-rate basis.
- b. Tell the closeout enumerator to visit each closeout unit once only. If he finds someone at home, he is to obtain all information omitted by the original enumerator and to verify any entries made by the original enumerator. If no one is at home when he visits the unit, he is to get as much information as possible from neighbors.
- c. When the closeout enumerator returns, review all closeout cases again and supply missing information according to the rules in paragraph E 7.5, Appendix E.

9.48 Transcription Verification

- a. Since the success of Stage II enumeration depends heavily on the information collected in Stage I, it will be necessary to verify the enumerator's transcription work very carefully according to the instructions in paragraph E 8.0 of Appendix E. If the review shows that the transcription is acceptable, the assignment should be sent to the District Office. If not, all transcription must be verified completely and corrected.
- b. If the transcription is not acceptable and the original enumerator is no longer available, assign it to an hourly enumerator for correction. Record the assignment on your F-237. Use a duplicate payroll form and insert it into the Listing Book. If the transcription has been corrected by the original enumerator, examine it again for accuracy. See paragraph E 8.4 of Appendix E. Look at the first sample housing unit or QQ on each page of the Listing Book and follow the procedure shown in Section IX of the F-243. If the transcription was assigned to an hourly enumerator, do not verify it; it will be verified in the District Office.

9.49 How to Make Your Daily Report of Field Review, F-239 (Exhibit 24)

- a. Who Makes the Daily Report. You and the Field Reviewer should complete separate Daily Reports and mail them to the District Office. However, on those days when the Field Reviewer is working as an enumerator, he does not have to fill out an F-239.
- b. When to Complete the Daily Report. A Daily Report must be completed for each work day during the Stage I enumeration period starting on April 2 and continuing until the last EA in your district is given a final review.

Complete the form after the last review of the day and mail it immediately afterwards.

Even if you have not done any review work during a working day, complete and submit a Daily Report. Fill in the identification items on the form and use the back of the F-239 to describe your activities that day.

c. How to Complete the Daily Report.

- Item 1. Date. This entry should be the date of the field review activity described on the form.
- Item 2. District Office Number. The code number of your District Office.
- Item 3. State. The name of the State in which your District Office is located.
- Item 4. Name of Crew Leader. Enter the name of the Crew Leader.
- Item 5. Signature of the Person Who is Filling This Report. Sign your name in the appropriate box even if it appears in Item 4.

d. How to Record Review Activity for Each Enumerator

- (1) Column (a). Name of Enumerator. Enter the name of each enumerator whose work you have reviewed during the work day. All details of the review for each enumerator will be entered on the same line as his name.
- (2) Columns (b)-(g). Enter the number of errors in Section I through VI. Copy the entries in column (a), Section VII of the F-243 for the review you are reporting.
- (3) Columns (h)-(o). Field Review Action. Check the column which describes the review and action you took after reviewing the work of the enumerator. Be sure you check only one review action for each enumerator. If a Field Reviewer recommends that an enumerator is released, he will check the column on the F-239 headed "Enumerator Released." When the Crew Leader confirms the release, he will not enter it on his form, a second time. If the enumerator failed review because he omitted a pre-listed unit, (see paragraph E 5.72 of Appendix E)

QUALITY CONTROL OF THE FIELD ENUMERATION

but you decide to keep him because he had not missed any units previously, explain your action on the reverse side of the F-239.

- (4) **Columns (p) and (q). Closeout Review.** Make entries in these columns only after the enumerator has had a final review and you have reviewed the closeout cases. Your entries on this form will be based on Section VIII of the F-243.

- (a) If line 47 in Section VIII is marked "no," check the column (p), "EA Accepted."
- (b) If line 47 in Section VIII is marked "yes," check column (q), "EA Assigned to Closeout Enumerator."
- (c) Check only one of these two columns.

- (5) **Columns (r) and (s). Transcription Verification.** Make an entry in these columns only after you have reviewed the transcription to the Stage II ED Books. Refer to Section IX of the F-243.

- (a) If line 51 is marked "yes," check column (r), "EA Accepted."
- (b) If line 51 is marked "no" check column (s), "EA Held for Correction."

It is possible that you may conduct a final field review for an enumerator on one day, and perform the closeout review and transcription verification on another day.

If so, record the final review in the Daily Report for the day on which it was conducted, leaving the closeout and transcription review columns blank. Make the entries for the closeout review and transcription verification in the Daily Report for the following day, leaving the other columns blank. Be sure to enter the enumerator's name on the reports for both days.

Total columns (h) through (q) for every Daily Report of Field Review. Note that you will have separate totals by type of review: first, second, third, and final. Enter the closeout totals even though you make this review after the final review.

If you spent less than 6 hours on field review, closeout review, and transcription review, describe briefly your other census activities during that day in the "Remarks" on the reverse side of the Daily Report.

9.5 Refusals

Occasionally an enumerator may encounter a respondent who refuses to give part of the required information or to be interviewed at all. Such rare cases will be reported to you.

You should call on the respondent to obtain the required information. Point out the confidential treatment accorded to Census information, and that information obtained in the census cannot be used for purposes of taxation, investigation, or regulation. If necessary, you may point out the legal basis for the census and invite the respondent to read the section of the act which relates to refusals (section 221, Appendix F, Enumerator's Reference Manual). If the respondent is still uncooperative, inform him that you will have to make a written report to your District Supervisor. Do not become involved in any arguments. Merely state that you are doing your job in accordance with your instructions.

Your report of a final refusal should be in a memorandum to your District Supervisor, including the following information:

- Name and address of person refusing to give information.
- Date of original and later calls, by whom made, and name of respondent at each call.
- Extent of information refused.
- Reasons given, if any, for refusing information.

Make certain that, as a minimum, the enumerator has recorded on the FOSDIC schedule the names of all occupants, their race and sex, whether obtained from the respondent or from another source.

APPENDIX E

HOW TO USE FORM F-243, RECORD OF FIELD REVIEW

- E1.0 **When to Fill Out a Record of Field Review.** One Record of Field Review is to be filled out for every enumerator's assignment. If more than one enumerator works on an assignment, fill out one form for each enumerator. If an enumerator works on more than one assignment, fill out one form for each of his assignments.

- E2.0 **Completing the Heading of the F-243.** Make the following entries before the first review:

- Item a. **District Office Number.** Enter the District Office number, which appears on your F-237, Record of Assignment.
- Item b. **ED numbers.** Enter numbers of all the ED's in the enumerator's assignment.
- Item c. **Name of Crew Leader.** Enter your own name.
- Item d. **Name of Field Reviewer.** Enter the name of the Field Reviewer.
- Item e. **Enumerator.** Enter the name, address, and telephone number of the enumerator.

- E3.0 **Recording Appointments for Review.** When you make an appointment to review the enumerator's work, record the date, time and place in "Appointments for Review," item f of the F-243. Make your appointment with the enumerator for the first field review when you give him his assignment at the end of the training class. When you do this give the enumerator the identical information in Section B of the same F-242, Schedule of Field Appointments, which tells him where to report for his induction. Schedule the first two appointments with the Field Reviewer to last one and one-half hours.

For example, on April 2 if the first review is scheduled for 8:30 A.M., the second appointment would start at 10:00 A.M. and last until 11:30. Schedule the third appointment to last from 11:30 to 12:30. If the Reviewer has four more one hour appointments in the afternoon, he will have reviewed the work of seven enumerators in all on April 2.

In paragraph 9.42 of this manual we suggested that the Crew Leader do fewer reviews on April 2 since he needs additional time for other duties. If the Crew Leader schedules two appointments for one and one-half hours each for the morning of April 2, he should schedule no more than two for the rest of the day.

Each time you finish reviewing an enumerator's work, be sure to schedule the next appointments so that you will be meeting with the enumerators at the rate of one per hour. When you complete the field review, enter the appointment for the next review on the F-243. Give the enumerator an F-242 as well showing when and where to report for his field review. Note that you will have to cross out the word "first" and write in "second" or "third" as necessary.

Since you will not be able to schedule the final review ahead of time, instruct the enumerator to notify you as soon as he has completed the assignment and is ready to have his work reviewed. Since, in general, Field Reviewers will be assigned to other work after April 4, they should arrange for later reviews to be handled by the Crew Leader.

- E4.0 **How to Record Errors on the F-243.** Record errors on the line which describes the type of error. For example, if you find during the second review that H1 is blank in the ED Book, tally the error on line 22 in the "second review" column. As you conduct the review, you may find errors in units other than those you are directed to check on the F-243. See that the enumerator records these on his F-244 and corrects them, but do not record these errors on your F-243. In some cases it may be difficult to determine the exact number of errors made. In such cases use your best judgment since we are more concerned with seeing that a good job is done rather than having a perfect F-243. Do not interpret this instruction to mean that you may be careless in recording errors on the F-243.

- E4.1 **Sections IV through VI** require that you tally every error. Do this by drawing a tally mark for each error starting at the left hand side of the space. After you have completed the review count the number of marks on each line and place each total on the right hand side of the space and circle it. For example:

Section IV-POPULATION REVIEW	First review	Second review	Third review
Check persons in housing units on _____ (Check only persons in housing units completed by interview)	Last five FOSDIC pages with entries Last page checked	Last five FOSDIC pages with entries Last page checked	Last five FOSDIC pages with entries Last page checked
For Lines 14 through 20 tally and total the number of times.	ED. 17-23 Page 12	ED. _____ Page _____	ED. _____ Page _____
14. Either P1 or H1 is not in correct sample key order.	—		
15. Blank, double mark, or bad FOSDIC mark in P2 through P7.		⑥	

This example shows that, during the first review, you found 6 errors when checking items P2 through P7 and that you entered and circled the total number of tally marks in the same column.

- E4.2 **Sections II and III** consist of questions that can be answered "yes" or "no". A "no" answer means that an error has been made. Check "no" even if there is only one housing unit in error; otherwise check "yes".

If you check "no" when you find an error in one of the units, continue the review for the remaining housing units. For example, if a housing unit in the Listing Book does not show number of persons in column (12), check "no" for line 5 of the F-243; however, continue to check for entries in column

(12) for all of the remaining housing units on the page, except callback cases. Even though you check "no" after finding the first error, have the enumerator record all similar errors on his F-214 so that he may correct them.

E4.3 Line 31-36. The heading above lines 31 through 36 reads "Also check the following points when you review the FOSDIC Book." These questions are handled in the same manner as Sections II and III.

E5.0 How to Conduct First, Second and Third Reviews.

E5.1 Section I - Check for Missed Units. For the first review turn to item 4 A of the F-236 for this assignment. Determine how far the enumerator has gone. Read the addresses of the prelisted housing units. Do not go beyond where the enumerator has canvassed at the time of the review. Have the enumerator locate each unit in the Listing Book as you read it. When he locates the unit have him give you the Listing Book page and line number which you will record in columns (f) and (g) in the F-236. If the enumerator is in an EA which was not prelisted, you will not be able to make this check. Write "No prelisting" on line 1 of the F-243.

If a prelisted unit cannot be found in the Listing Book, check column (h). Tell the enumerator that he must go back to the beginning of the block or road segment where the unit was missed and recanvass to see whether he has missed any other units in that area.

On the second and third reviews check the prelisted units not previously checked. Most of these will appear in item 4B of the F-236. Do not check units beyond the point where the enumerator has listed.

Line 1. Enter the number of units missed by the enumerator according to items 4A and 4B, column (h) of the F-236. This is the number which the enumerator presumably missed.

Enter in item 5, column (d), of the F-236 the number of housing units listed by the enumerator in each block up to the time of the field review. Do not include the last block listed if the enumerator has not completely canvassed it.

Compare your estimate in item 5, column (c), of the F-236 with the number of units listed by the enumerator as shown in column (d). If the number in column (d) is appreciably different from your estimate, check first to see if he has failed to enter a block number in the Listing Book.

If the difference cannot be explained, instruct the enumerator to go back to the block in question so that he can be sure that he has not missed any housing units.

E5.2 Sections II and III - Listing Book Reviews.

Examine entries appearing on the last full page of the Listing Book. These sections of the review consist of questions that are to be checked "yes" or "no".

Line 2. Check that enumerators in block areas are canvassing in their ED's and blocks within ED's in the order shown on the map backing sheets.

Line 3. In block areas examine the way the house numbers have been recorded in the Listing Book to see whether the enumerator is visiting units in the correct order and that he is starting each block according to his instructions and that he is not skipping around at will. Where map arrow road numbers are used, check that the enumerator is working down both sides of the road in order as instructed.

Line 4. Check column (5) of the Listing Book to see that the enumerator has assigned the sample key letter to each unit in correct order as he was instructed.

If you find an error in the sample key, go to the first page of the Listing Book and check column (5) on that page and all following pages. See that one of the first four housing units on page 1 of the Listing Book has a sample key of "A" and that every fourth unit following it has a sample key of "A" (not counting Q's).

If you find more than one case where there are either more than three or less than three non-sample housing units between "A" units, correct the sample key order for the entire assignment both in the Listing Book and in the ED books. Instruct the enumerator to return to every housing unit which now has a sample key of "A" but did not have one before and leave a household questionnaire form there. It will not be necessary for the enumerator to recover any questionnaires previously left at units that have had a sample key of "A".

Otherwise do not correct the sample key. However, on the enumerator's F-214 note all sample key errors and on the F-243 check the "no" column on line 4.

Line 5. Check that the number of persons is entered for every occupied housing unit the enumerator has completed.

Line 6. Check column (13) to see that there is an "A" or "QQ" entry for each completed sample unit.

Line 7. Total the number of times you checked "no" on lines 2 to 6 of Section II.

Line 8. Examine column (1), (3) and (4) of the Listing Book. If you believe the housing unit can be found by the Stage II enumerator on the basis of these entries without any trouble, the entries are adequate. In rural areas see that the enumerator is entering triangles on his map to denote "A" and starred "QQ" units.

Line 9. See that the enumerator has filled column (6) of the Listing Book in accordance with the instructions at the top of the column.

Line 10. Check that there is a page number for each unit in column (7).

Line 11. Check that the enumerator is filling column (8) and (9) of the Listing Book for units at which callbacks are necessary. If column (10) is not checked, at least column (8) must have an entry.

Line 12a. See that an "X" appears in either column (10) or column (11) of the Listing Book for every completed housing unit.

Line 12b. If the number of units completed by the closeout procedure is more than one per Listing Book page, question the enumerator about it.

Line 13. Total the number of times you checked "no" on lines 8 to 12 of Section III.

E5.3 Section IV - Population Review.

Review the entries for persons in housing units completed by interview, according to column (10) of the Listing Book on the last five pages of the Stage I ED book filled by the enumerator. At each review, identify the last FOSDIC page you review by entering the ED number and page number at the top of the column on page two of the F-243. Tally the number of omissions, double marks and bad FOSDIC marks in items P2 through P7 on line 15. Also note that you should not tally errors in these items if P2 is "VAC". If the items you review are for persons in hotels, motels, or places enumerated by special procedures where it may have been difficult to get complete information, do not count omissions as errors. Since item P6 requires 3 circles to be marked, tally one error only, even though month, decade and year are all blank for an individual. Similarly, in item H16 on the PH-2, tally only one error if the item is blank. Make the consistency checks described on lines 14 and 16 through 20 of the F-243. Enter the total number of errors in this section on line 21.

E5.31 Sample Key Letter.

The first thing you check when you review the population items is that entries in P1 and H1 are in the correct sample key order. If you find an error in the sample key order, instruct the enumerator to note the error on his Record of Errors. However, before you go on with the review take the necessary steps to correct P1 and H1 since the enumerator is not to correct the sample key by himself. See whether the sample key entries in the ED Book agree with those in the Listing Book since the enumerator may have copied the letter incorrectly. If they do not agree with the Listing Book, change sample key letters in the ED Book so that they do agree. If there is still an error on the FOSDIC page, apply the rules which follow.

E5.32 Rules for Correcting Sample Key.

- a. FOSDIC page with two or more sample key letters the same. (This rule does not apply to Q's.) Consider the case where one of the sample key letters is repeated on an ED Book page; for example, A B B C. If this sequence of letters in the ED Book agrees with the Listing Book, copy the information for the unit for which the key letter is repeated to the first available blank page in the ED Book. In copying, use the same sample key letter on that page. Cancel the copied unit on the original FOSDIC page. Correct column (7) of the Listing Book to show the new page number in the ED Book.
- b. If you find that a letter has been skipped on the FOSDIC page as in the following examples, and the letters agree with the Listing Book, do not make any corrections.

Example 1:

Page 2	Page 3
B	C
C	D
D	A
A	B

Although the first unit on page 3 should have been "B", do not make any changes in such a case.

QUALITY CONTROL OF THE FIELD ENUMERATION

Example 2:

Page 14

D
GQ
B
C

Do not try to correct such a case if it agrees with the Listing Book

E5.4 Section V - Housing Review.

Check housing items only for the same housing units for which you made the population review. Tally all omissions, double marks and bad FOSSIC marks on lines 22 through 29 of the F-243. Enter the total number of errors in this section on line 30.

E5.5 Also Check the Following Points When You Review the FOSSIC Book.

The checks shown on lines 31 through 36 of the F-243 are very important. Keep these checks in mind during the entire field review. If you check "no" for any line, see that the enumerator knows what he is doing wrong before he starts working again.

E5.6 Section VI - FOSSIC Book - Listing Book Review.

Line 37. As you check the ED Book ask the enumerator to locate the unit in the Listing Book. Ask him to read you the sample key letter in column (5). If you have a different sample key letter in the ED Book for that unit, tally an error. Refer to the rules in section E5.3 for making corrections.

Line 38. Ask the enumerator to read you the number of persons in column (12) of the Listing Book. If a unit is vacant in the ED Book, see that the unit is vacant in the Listing Book. If the enumerator says that the unit requires a callback according to the Listing Book, see that this agrees with the ED Book and that enough blank lines have been left. If the number of persons in the ED Book is different, tally an error.

Line 39. Enter the total number of errors tallied on lines 37 and 38.

E5.7 Section VII - How to Take Action.

The action you take as a result of the first, second, or third reviews will depend on the number of errors you have found in each of the six review sections.

Enter in column (a) of Section VII the total number of errors made by the enumerator in each of the review sections. Be sure that you make these entries in the appropriate part of Section VII depending on the review you are conducting. If this is the first review, enter totals in the space under line 40; if second review, under line 41; and if third review, under line 42.

Compare your entries in column (a) with the numbers printed in column (b). If for any section your entry in column (a) is greater than the number in column (b) circle the entry in column (a).

Next look at column (c), "How to Take Review Action".

E5.71 First Review.

- a. If there are no circled entries in column (a), it indicates that the enumerator has learned his job well and has made only a few errors. Tell him that his work will not be reviewed again until he has completed his entire assignment. You will at this time instruct him briefly in the transcription procedure. Have him transcribe one or two sample housing units to the stage II ED book in your presence so that you may see that he is doing it properly.

When he has finished his assignment and has completed the Stage II transcription, he is to notify you by phone so that an appointment can be made for a final review.

- b. The Crew Leader will release the enumerator or the Field Reviewer will recommend to the Crew Leader that he be released if either of the following occurs.

- (1) The entry for Section I, line 1 in column (a) is circled.
- (2) Three or more entries in column (a) are circled for Sections II through VI.

Paragraph 9.45 of this manual contains details on how to release enumerators who do poor work.

Only Crew Leaders can release enumerators. Field Reviewers will recommend release and submit the form F-243 together with the Listing Book and ED Books to the Crew Leader for his action.

- c. All other enumerators (those not covered by parts a. and b. above) will require a second review and, in some cases, additional training. The enumerator is not to start transcribing to the Stage II ED Book until his work shows that no further review is required until the final review.

- (1) If you feel that the enumerator needs more training, arrange to meet with him as soon as your field review schedule permits. At that time go over his weak points, with him and, if you have time, watch him enumerate several housing units.

- (2) Schedule the second review within 24 hours. However, be sure that the enumerator has been able to list at least 25 more housing units in this time.

- (3) Keep in mind that even though an enumerator passes field review, the Crew Leader may release him if in his opinion the overall quality of his work will not be satisfactory when his assignment is completed.

- (4) If the enumerator wants to give you the ACR's he has picked up for units he has enumerated up to this time, take them from him. You must be sure that his ACR's are put back in the portfolio for his EA when you transmit it to the District Office. Therefore, tie the ACR's together securely and write the EA number on the top page.

E5.72 Second Review

- a. If there are no circled entries in column (a), it indicates that the enumerator has learned his job well and has made only a few errors. Tell him that his work will not be reviewed again until he has completed his entire assignment. You will at this time instruct him briefly in the transcription procedure. Have him transcribe one or two sample housing units to the Stage II ED Book in your presence so that you may see that he is doing it properly.

When he has finished his assignment and has completed the Stage II transcription, he is to notify you by phone so that an appointment can be made for a final review.

- b. The Crew Leader will release the enumerator or the Field Reviewer will recommend to the Crew Leader that he be released if either of the following occurs.

- (1) The entry for Section I, line 1 in column (a) is circled. If the enumerator did not miss any prelisted units on his first review and no more than one on his second review, you need not release him if you feel he is doing an acceptable job otherwise.

- (2) Two or more entries in column (a) are circled for Sections II through VI.

Paragraph 9.45 of this manual contains details on how to release enumerators who do poor work.

Only Crew Leaders can release enumerators. Field Reviewers will recommend release and submit the Form F-243 to the Crew Leader for his action.

- c. All other enumerators (those not covered by parts (a) and (b) above) will require a third review and in some cases additional training.

- (1) If you feel that the enumerator needs more training, arrange to meet with him as soon as your field review schedule permits. At that time go over his weak points, with him and, if you have time, watch him enumerate several housing units.

- (2) Schedule the third review within 24 hours. However, be sure that the enumerator has been able to list at least 25 more housing units in this time.

- (3) Keep in mind that even though an enumerator passes field review, the Crew Leader may release him if in his opinion the overall quality of his work will not be satisfactory when his assignment is completed.

E5.73 Third Review.

- a. If there are no circles in column (a), do not review the enumerator's work again until the final review.

- b. If there are one or more circled entries in column (a), release the enumerator. The procedure for the third review is very much like that for the first or second reviews except that no further reviews before final review will be scheduled. If, after three reviews, an enumerator is still making more errors than shown in column (b), he will be released.

If the enumerator passes the third review, tell him his work will be reviewed again when he has completed his EA.

Instruct him briefly in the transcription procedure. Have him transcribe one or two sample units to the Stage II ED Book in your presence so that you may see whether he is doing it correctly. Tell him to notify you by phone when he completes his EA so that you can make an appointment for final review.

When you have taken a review action for any review, initial that action in column (d) of Section VII. Be sure that you have initialed the correct action for the correct review.

must delete the entries he has previously transcribed into the Stage II ED Book by drawing a large "X" in the housing section and every population section in the Stage II ED Book for that unit.

If there are many changes required, a new Stage II ED Book should be used. The enumerator must then transcribe the entries for every "A" unit and sample person in QQ's in the ED. The old Stage II ED Book must be destroyed.

Otherwise do not correct the sample key. However, have the enumerator note all sample key errors on his F-214 and check the "no" column on line 4 of the F-243.

E6.0 How to Conduct the Final Review.

E6.1 Section I - Check for Missed Units.

For the final review turn to item 4B of the F-236 for this assignment. Read the addresses of the prelisted housing units which you have not checked yet. Have the enumerator locate each unit in the Listing Book as you read it. When he locates the unit have him read you the Listing Book page and line number which you will record in columns (f) and (g) on the F-236. During the final review examine column (h), items 4A and 4B, of your F-236 for units which the enumerator missed according to earlier reviews. Ask the enumerator to read to you the page and line number in the Listing Book for these units to see whether he has gone back to enumerate them.

If a prelisted unit cannot be found in the Listing Book, check column (h) of form F-236. Tell the enumerator that he must go back to the beginning of the block or road segment where the unit was missed and canvass to see whether he has missed any other units in the area.

Line 1. Enter the number of units missed by the enumerator since the last review according to column (h) of the F-236.

Enter in item 5, column (d), of the F-236 the number of housing units listed by the enumerator in each block enumerated since the earlier review.

Compare your estimate in column (c) with the number of units listed by the enumerator as shown in column (d). If the number in column (d) is appreciably different from your estimate, check first to see if he has failed to enter a block number in the Listing Book. If the difference cannot be explained, instruct the enumerator to go back to the block in question so that he can be sure that he has not missed any housing units.

E6.2 Sections II and III - Listing Book Reviews.

Examine entries appearing on pages 4, 9, 14, 19 and 24 of the Listing Book.

Line 2. See that enumerators in block areas have canvassed their ED's, and blocks within ED's, in the order shown on the map backing sheets.

Line 3. In urban areas, examine the way the house numbers are listed to see whether the enumerator has visited units in the correct order (and is not skipping around) and that he is starting each block according to his instructions.

In rural areas see that the enumerator worked down both sides of the road as instructed.

Line 4. Check column (5) of the Listing Book to see that the enumerator has assigned sample key letters as he was instructed.

If you find an error in the sample key, go to the first page of the Listing Book and check column (5) on that page and all following pages. See that one of the first four housing units on page 1 of the Listing Book has a sample key of "A" and that every fourth unit following it has a sample key of "A" (not counting QQ's).

If you find five or more cases where there are either more than three or less than three non-sample housing units between "A" units, correct the sample key order for the entire assignment both in the Listing Book and in the ED Books. Instruct the enumerator to return to every housing unit which now has a sample key of "A" but did not have one before and leave a household questionnaire form there. It will not be necessary for the enumerator to recover any questionnaires previously left at units that have had a sample key of "A".

After all corrections have been made in the Listing and Stage I ED Books, have the enumerator correct the entries he has transcribed into the Stage II ED Books.

- (a) For each unit for which the sample key letter (B, C or D) changed to "A" the enumerator must transcribe the entries into the Stage II ED Book on the next blank page.
- (b) For each unit for which the sample key letter changed from "A" to B, C, or D, the enumerator

Line 5. See that the number of persons is entered for every occupied housing unit.

Line 6. Examine column (13) to see that there is an "A" or "QQ" entry for each sample unit.

Line 7. Total the number of times you check "no" on lines 2 to 6 of Section II.

Line 8. Examine columns (1), (3) and (4) of the Listing Book. If you believe the housing unit can be found by the Stage II enumerator on the basis of these entries without any trouble, the entries are adequate.

Line 9. See that the enumerator has filled column (6) of the Listing Book in accordance with the instructions at the top of the column.

Line 10. Check that there is a page number for each unit in column (7).

Line 13. Total the number of times you checked "no" on lines 8, 9 and 10 of Section III.

E6.3 Section IV - Population Review.

Review the entries for persons in housing units completed by interview, according to column (10) of the Listing Book, on pages 11, 44, and 77 of each Stage I ED Book filled by the enumerator. Tally the number of omissions, double marks and bad FOSDIC marks in items P2 through P7 on line 15. If the items you review are for persons in hotels, motels, or places enumerated by special procedures where it may have been difficult to get complete information do not count omissions as errors. Make the consistency checks described in lines 14 and 16 through 20 of the F-243. Enter the total number of errors in this section on line 21.

E6.31 Sample Key Letter.

The first thing you check when you review the population items is that entries in P1 and P3 are in the correct sample key order. If you find an error in the sample key order, instruct the enumerator to note the error on his Record of Errors. However, before you go on with the review take the necessary steps to correct P1 and P3 since the enumerator is not to correct the sample key by himself. First, make the sample key entries in the ED Book agree with those in the Listing Book since the enumerator may have copied the sample key letter incorrectly. If they do not agree with the Listing Book, change sample key letters in the ED Book so that they do agree. If there is still an error on the FOSDIC page, apply the rules which follow.

After all corrections have been made in the Listing and Stage I ED Books, have the enumerator correct the entries he has transcribed into the Stage II ED Books. This will be necessary only for units which have had their sample key letters changed from "A" to another letter or from B, C, or D to a sample key of "A".

E 6.32 Rules for Correcting Sample Key

- (1) FOSDIC page with two or more sample key letters the same. (This rule does not apply to QQ's.) Consider the case where one of the sample key letters is repeated on an ED Book page; for example, A B B C. If this sequence of letters in the ED Book agrees with the Listing Book, copy the information for the unit for which the key letter is repeated to the first available blank page in the ED Book. In copying, use the same sample key letter on that page. Cancel the copied unit on the original FOSDIC page. Correct column (7) of the Listing Book to show the new page number in the ED Book.
- (2) If you find that a letter has been skipped on the FOSDIC page, and the letters agree with those in the Listing Book, as in the following examples, do not make any corrections.

Example:

Page 2	Page 3
B	C
C	D
D	A
A	B

Although the first unit on page 3 should have been "B", do not make any changes in such a case.

Example 2:

Page 14

D
GQ
B
C

Do not try to correct such a case if it agrees with the Listing Book.

E6.4 Section V -- Housing Review. Check housing items only for housing units for which you made the population review. Tally all omissions, double marks and bad FOSDIC marks on lines 22 through 29 of the F-243. Enter the total number of errors in this section on line 30.

E6.5 Section headed - "Also Check the Following Points When You Review the FOSDIC Book." Keep these checks in mind during the entire field review. If you check "no" for any line, it may be necessary to do some additional work on the ED Books before they are sent to the District Office. For example, if line 31 were checked "no", it may be necessary to have the book cleaned up or even recopied if it is in very bad condition.

E6.6 Section VI -- FOSDIC Book -- Listing Book Review. Compare entries in the ED Book for each unit with entries in the Listing Book for the same unit.

Line 37. As you check the ED Book ask the enumerator to locate the unit in the Listing Book. Ask him to read you the sample key in column (5). If you have a different sample key in the ED Book for that unit, tally an error and make corrections according to Section E6.32 of Appendix E.

Line 38. Ask the enumerator to read you the number of persons in column (12) of the Listing Book. If the number of persons in the ED Book is different, tally an error.

Line 39. Enter the total number of errors tallied on lines 37 and 38.

E6.7 Section VII -- How to Take Action. The action you take as a result of the final review will depend on the number of errors you have found in each of the six review sections.

Enter in column (a) of Section VII the total number of errors made by the enumerator in each of the review sections. Be sure that you make these entries in the final review part of Section VII, line 43.

Compare your entries in column (a) with the numbers printed in column (b). If for any section your entry in column (a) is greater than the number in column (b) circle the entry in column (a).

Next look at column (c), "How to Take Review Actions."

- (1) If there are no circles in column (a), accept the enumerator's assignment as complete.
- (2) If there are one or more circled entries in column (a), the enumerator's assignment is not acceptable. Return the assignment to the enumerator and instruct him to correct the errors found and similar errors before you make the payroll computation.

E7.0 How to Conduct the Closeout Review.

E7.1 When to Conduct the Closeout Review. Conduct the closeout review after the enumerator's assignment has been corrected for errors found in the final review and has been accepted as complete. The enumerator will not be present during the closeout review.

E7.2 What Housing Units to Select. Review every housing unit completed by the closeout procedure. These will be units with an "X" in column (11) of the Listing Book.

E7.3 How to Conduct the Closeout Review. Inspect each population line in every closeout household to see if both of the following items have entries:

- a. Sex of the person in item P4.
- b. Race of the person in item P5.

If either one of these entries has been omitted, tally once on line 45.

Inspect each housing unit to see if all of the following items have entries:

- a. Sample key in item H1 and in item P1 on one population line.
- b. "Head" designated in item P3 on one population line.
- c. Type of housing unit in item H3.
- d. Access to unit in item H4.
- e. Occupancy of unit in item H7.

If any one of these necessary entries is omitted for a unit, tally once on line 46. If the unit does not have necessary housing or population items, circle the line number of the unit in the Listing Book.

After you have examined all the closeout units, enter the number of tallies on line 45 and line 46.

E7.4 How to Take Action in the Closeout Review.

- a. If the sum of errors on lines 45 and 46 is greater than 25, give the assignment to a closeout enumerator. Note the assignment on your F-237 so you will know who is working on the EA. Instruct this enumerator to visit each closeout GQ and housing unit once. If someone is at home when he calls, he is to get all the necessary information, and correct any entries made by the original enumerator. If this is a sample unit, he is to be sure they have a household questionnaire. If no one is at home, he is to get the following information from neighbors if possible:

- (1) Sex and race for each person in the unit.
- (2) Sample key in H1 and P1.
- (3) Head designated in P3 in housing units.
- (4) Type of unit in H3.
- (5) Access in H4.
- (6) Occupancy in H7.

If the household is a sample unit he is to leave a Household Questionnaire for the unit; tell him to put it under the door.

When the closeout enumerator returns this assignment, inspect the closeout units again to see if they have the necessary characteristics. Supply entries as shown in Section E7.5 which follows for those units that do not have such characteristics:

- b. If the sum of errors on lines 45 and 46 is 25 or less, supply the entries that are missing, if possible, as shown in Section E7.5 which follows.

E7.5 How to Supply Missing Entries.

- a. P4 - Sex. Enter male or female on the basis of the name entered in item P2 and relationship entry in P3. For example, Barbara Jones would be marked "female"; whereas Thomas Jones would be marked "male". A person marked "wife" in P3 is female.
- b. P5 - Race. Enter race according to the prevalent race on the FOSDIC Book page. If there is one person in the unit with an entry in item P4, supply the same "race" entry for all persons in the same unit. If there are no such entries in the unit to guide you, supply the "race" entry that appears for most of the persons on the ED book page or in the ED if there is only one unit on the page.
- c. P1, H1. - Sample Key. These can be supplied for items P1 and H1 by continuing the sample key order from the preceding unit, provided that the sample key order is then correct.
- d. Designation of "head". Mark "head" for the first person listed in the unit who is over 14 years or has age (P6) blank.
- e. H3 - Type of unit. Enter the type of unit shown for the preceding unit enumerated.
- f. H4 - Access. Enter the entry in item H4 for the preceding unit enumerated.
- g. H7 - Occupancy. Determine item H7 by the following rules:

- (1) If column (6) in the Listing Book has an entry of the name of the head, or if there is at least one person enumerated in the ED Book in the unit, the unit is "occupied."
- (2) If column (6) of the Listing Book has a "VAC" or "VAC-URE" entry, the unit is "vacant; year-round."

In all other cases do not supply missing entries.

E8.0 How to Verify the Transcription.

E8.1 When to Verify the Transcription. Verify the transcription after you do the closeout review. If it is necessary to give the assignment to a closeout enumerator, wait until his closeout work is completed before verifying the transcription.

E8.2 What Housing Units to Select. Verify the transcription of items in the last sample housing unit or GQ on every page of the Listing Book. These units will have an "A" or a "GQ" entry in columns (5) and (13) of the Listing Book entry in these columns. Review as many cases as there are pages with entries in the Listing Book. Enter the number of cases you review on line 49, Section IX -- Transcription Verification, of the F-243.

ES.3 How to Verify the Transcription. For each unit compare the entry in the Stage I FOSDIG Book to be transcribed with the corresponding item in the Stage II FOSDIG Book. Each time you find that the enumerator has failed to transcribe an item or you find a difference between the entries in the two books, it is an error and you must:

- a. Tally the error on line 50 in the space provided.
- b. Correct the Stage II ED Book entry so that it is identical with the Stage I entry.

If the enumerator failed to transcribe an entire unit, count each item, which should have been transcribed, as an error. Be sure the unit was not transcribed elsewhere (out-of-order) in the Stage II ED Book. If the unit was definitely omitted, transcribe it to the next available space in the Stage II ED Book.

ES.4 How to Take Action on the Transcription Verification. Enter the number of errors on line 50 in the space provided.

- a. If the number of errors tallied on line 50 is less than the total number of units checked on line 49, the transcription is acceptable. Check the "yes" box on line 51.
- b. If the number of errors tallied on line 50 is equal to or greater than the number of housing units checked on line 49, the assignment must be completely corrected and verified. Check the "no" box on line 51. Tell the enumerator that if failed verification and that he will not be paid for his transcription work until the entire

assignment has been reviewed and corrected. After he has corrected the transcription, verify the work in the same way as before. Since you corrected the errors you found while you were verifying, this time check the transcription items in the first sample housing units on each Listing Book page.

If the enumerator is not available to correct his transcription, give the assignment to an hourly enumerator to review and correct all transcription. In this case the original enumerator should not be paid for transcription. Do not verify the work of hourly enumerators assigned to correct transcription.

ES.0 Separate ED's Which Are Institutions or Large Group Quarters.

Make the following checks for ED's in this category when you review the enumerator's work:

- a. First, see that staff members and their families who are living in housing units have been enumerated separately.
- b. Next, see that one Group Quarters has been listed for other persons, and that staff members living in the Group Quarters are enumerated first, and then the inmates.
- c. Be sure that the enumerator made arrangements to get sample information for persons in Group Quarters enumerated on lines in the ED Book with a "star" (*) in Item P1.

Detailed instructions for enumerating persons in institutions and large Group Quarters which are separate ED's are in Appendix A of the Stage I Enumerator's Reference Manual.

Appendix C. CREW LEADER'S MANUAL, STAGE II OF TWO-STAGE AREAS
(Extracts)

Part I--General Information

- 1.0 Introduction
- 1.1 Stage II Crew Leader Assignment
- 1.2 Crew Leader Appointment, Pay and Hours
- 1.3 Crew Leader Activity Calendar

Part III--Taking the Census--Stage II

- 4.3 Conducting the Field Review
 - 4.31 General
 - 4.32 Location and Frequency of Review.
- 4.4 How to Use Form F-244, Record of Field Review (PH-3 and PH-4)
 - 4.41 Heading Items a through f
 - 4.42 The Enumerator's Record of Errors, F214
 - 4.43 Types of Errors You May Find
 - 4.44 How to Record Errors on the F-244
 - 4.45 How to Select Units to be Reviewed
 - 4.46 How to Make the Checks in Section I, F-244
 - 4.47 Section II--How to Make the Checks in Household Questionnaire Transcription
 - 4.48 Section III--ED Book Review--Housing Items
 - 4.49 Section IV--ED Book Review--Population Items
 - 4.50 Additional ED Book Checks
 - 4.51 Section V--Listing Book--ED Book Comparison
 - 4.52 Section VI--How to Take Action
 - 4.53 Section VII--Close-out Review
 - 4.54 Releasing enumerators who do unacceptable work
 - 4.55 Reassigning EA's
 - 4.56 Correcting Errors Found During Final Review
 - 4.57 How to Make Your Daily Report of Field Review, F-239

PART I - GENERAL INFORMATION

1.0 **INTRODUCTION.** As a Crew Leader during Stage I of the 1960 Census of Population and Housing, you have gained experience which will be extremely useful to you during the Stage II field operations. Under the direction of the District Supervisor, you and the enumerators selected from those who satisfactorily completed their Stage I enumeration will be responsible for obtaining complete and accurate replies to the questions directed to the specific sample units and persons selected in the 25% sample.

This manual covers primarily the additional operations called for in Stage II. For many of the topics and steps to be covered, your Stage I Crew Leader's Manual is to be used as a reference, so you should keep it handy at all times.

Generally you will be supervising the work of 15-18 Stage II enumerators in three adjoining Stage I Crew Leader Districts, one of which will usually be that to which you were originally assigned. Each Stage II enumerator, similarly, will usually be given three Stage I enumeration assignments as a normal assignment. As in Stage I, you will be assisted by a Field Reviewer in reviewing the work done by the Stage II enumerators.

1.1 **STAGE II CREW LEADER ASSIGNMENT.** This manual contains the instructions for the operations you will be expected to conduct. Your assignment involves the following responsibilities:

- a. Satisfactorily completing technical training for Stage II given by the Technical Officer.
- b. Conducting the technical training of your enumerators.
- c. Supervising M-night enumeration for any such establishments in your Crew Leader Districts.
- d. Reviewing your enumerators' work.
- e. Distributing additional EA assignments to the enumerators, completing final reviews, computing enumerator payments, and shipping completed EA's to the District Office.
- f. Supervising the Field Reviewer's work.

1.2 **CREW LEADER APPOINTMENT, PAY AND HOURS.** Your original appointment covers your duties as a Stage II Crew Leader. You will continue to be paid at a rate of \$1.95 per hour, when actually employed, including hours you are in training. Except for your training period you will be expected to work such hours as are necessary to complete your assignment.

1.3 **CREW LEADER ACTIVITY CALENDAR.**

Notification of Selection as Stage II Crew Leader.....	April 11
Stage II Enumerator Training Space Secured.....	April 13
Stage II Enumerators Selected and Notified.....	April 13-16
Stage II Crew Leaders and Field Reviewers (1st Group) receive technical training.....	April 14-15
Stage II Enumerator Training.....	April 14-19
M-night arrangements completed.....	April 19 P.M.
Stage II Field Reviewers (2nd Group) trained.....	April 20
Stage II Enumeration Begins.....	April 20
M-night.....	April 20
First Daily Report of Field Review mailed.....	April 22
Stage II Progress Reports begin.....	April 25
Stage II Clean-up Crew Leaders selected.....	May 4
Stage II Crew Leader assignments terminated.....	May 6

4.3 **CONDUCTING THE FIELD REVIEW**

4.31 **General.** In Stage II, as in Stage I, the purpose of field review is to insure that the information collected by the enumerator is accurate and complete. The best way to do this is to find out as quickly as possible how well each enumerator is doing his job. In general, the principles of field review are very similar to those followed in Stage I.

Since much of the information will be in the form of entries transcribed to the ED Books from the Household Questionnaires, it is extremely important that the enumerator does such transcription correctly.

Some Household Questionnaires will not have all the necessary information. Some households will fail to return the Questionnaires. For this reason you must see that the enumerator knows when he must follow up for additional or correct information.

All work coming from your district will be inspected in the District Office. If enumerators know how you select housing units for review, they may tend to be particularly careful with those units and you may accept work occasionally which will be returned by the District Office for further enumeration.

If an EA is returned to you from the District Office for correction, review the entire assignment for errors. First, see that the Listing Book agrees with the ED Books; particularly with respect to sample key letter. Next, check all ED Books for omissions, bad FCGDIC marks and double marks. Then make all necessary corrections in the Stage II ED Books. When you are satisfied that the ED Books are acceptable, return them to the District Office together with the Listing Book.

4.32 **Location and Frequency of review**

a. **Where to conduct the review.** In order to review the work of as many enumerators as possible, instruct enumerators to meet you and the Field Reviewer at some central location as in Stage I. See your Stage I Crew Leader Manual, F-230.

b. **Frequency of review.** You will review the enumerator's first EA at least twice and you will review each of his other EA's once only. Paragraphs (1), (2) and (3) which follow, tell in general, how you will schedule the first review and how to go about scheduling later reviews.

- (1) **First review-First EA.** When you give the enumerator his assignment at the end of the training class, make an appointment with him for first review. You and the Field Reviewer should work out a schedule so that the work of each enumerator will be reviewed at least once before the evening of April 23.

No review appointments will be scheduled on April 20, and 21 in order to give enumerators time to complete enough work to be reviewed. When you schedule the first field review with an enumerator, make a record of the date, time and place in Section B of the Form F-242, Schedule of Field Appointments, which you give to the enumerator. (Exhibit 11) Also record this information in Item f of the F-244, Record of Field Review, that you will use for this enumerator's first EA, so that you will have a record.

Although the average review will take about one hour, allow 90 minutes for each of the first two reviews you schedule for yourself and for each of the first two reviews scheduled for the Field Reviewer; you will both need a little extra time until you become familiar with the procedure. For example, on April 22 if the first review is scheduled for 8:30 a.m., the second appointment would start at 10:00 a.m. and last until 11:30. Schedule the third appointment to last from 11:30 to 12:30.

The reviewer should have four more appointments in the afternoon of one hour each, so that he will be reviewing the work of seven enumerators in all on April 22. In general, Field Reviewers and Crew Leaders should each be able to make about 6 to 8 reviews per day.

- (2) **Intermediate Review of first EA.** If the results of the first review show that another review of the enumerator's first EA is necessary, schedule an "intermediate" review of this EA. Schedule the review so that the enumerator will have enough time in which to do the following:

- a. Transcribe Household Questionnaires for sample units on pages 5 through 8 of the Listing Book.
- b. Make one follow-up attempt at each sample unit for which additional information is required.

Allow at least a day and a half for him to do this work. Give the enumerator a Schedule of Field Appointments, F-242, telling him where and when to report for his next review.

- (3) **Final Review.** You will make a final review of each EA. Since you will not be able to schedule a final review ahead of time, instruct the enumerator to notify you as soon as he has completed an EA and is ready to have his work reviewed. Since Field Reviewers will be assigned to other work after April 25, they should arrange for later reviews to be handled by the Crew Leader. In addition to the first review of the first EA, each EA will be given a final review.

QUALITY CONTROL OF THE FIELD ENUMERATION

4.4 HOW TO USE FORM F-244, RECORD OF FIELD REVIEW (PH-3 AND PH-4)

- 4.41 Heading Items a through f. On the last day of enumerator training you will make an appointment with each enumerator to review his first EA for the first time. His record of the appointment will be the form F-242, Schedule of Field Appointments. The reviewer's record will be the Form F-244 which you prepare in advance. (Exhibit 6)

Make the following entries on the F-244 in items a through e in the training class:

- Item a. District Office Number. Enter the District office number which appears on your F-237, Crew Leader Record of Assignment.
- Item b. ED Numbers. Enter numbers of all the ED's in the enumerator's first assignment.
- Item c. Name of Crew Leader. Enter the Crew Leader's name.
- Item d. Name of Field Reviewer. Enter the name of the Field Reviewer if he is to review the enumerator's work.
- Item e. Enumerator. Enter the name, address, and telephone number of the enumerator. Prepare a separate F-244 for each EA; that is to say, for each Listing Book. If more than one enumerator works on the EA, prepare a separate F-244 for each enumerator.
- Item f. Record all appointments for field review in item "f" of the F-244. Enter the time, date and place for each review at the time you make the appointment with the enumerator.

- 4.42 The Enumerator's Record of Errors, F-214. When you start the first review, give the enumerator a blank F-214 (Exhibit 5) to record his errors as he did in Stage I.

When you find an error in a population item, the enumerator should record on the F-214 the name of the person for whom the error was made since there are no line numbers in the Stage II ED book. Collect the forms F-214 from the enumerator when he completes an EA to be sent to the District Office along with his Listing Book, ED books, F-244 and other materials.

4.43 Types of Errors You May Find.

- a. Omission of entries (blanks) in items that require entries. You must recognize when entries are required. As you learned earlier, for example, some population items are only required for persons 14 years old and over, certain housing items apply only to occupied housing units. The schedule itself, you will recall, tells you when information is necessary by means of printed instructions and arrows.
- b. Double marks result from filling more than one circle in an ED Book item.
- c. Bad FOSDIC marks are marks that are too light or do not fill the circle completely. Such marks are the same as omissions.
- d. Inadequate written entries will occur mainly in item P27 in cases where the enumerator has not described the occupation and industry of a person in sufficient detail.
- e. Failure to transcribe correctly from the Household Questionnaire to the ED Book. This may result either in an omission or in transcribing an entry incorrectly by marking the wrong FOSDIC circle or copying the written information inadequately.
- f. Lack of agreement between ED Book and Listing Book. For example, if the number of persons in column 18 of the Listing Book is different from the number of persons shown in the ED Book for the same unit, it could be an error. The Enumerator's Reference Manual and the green sheet in the ED book deal with certain cases where differences are permissible and should not be counted as errors.
- g. Lack of agreement between Stage I and Stage II in the Listing Book will be counted as an error when columns (12) and (18) for a unit do not agree and there has been no change in the persons living in the unit.
- h. Unnecessary entries. Do not count as an error any entry in an item when no entry is required. For example, an entry is unnecessary in item H22 when the housing unit is vacant. If there is such an entry in H22, do not tally it as an error but merely advise the enumerator not to waste time making entries that are not necessary.

- 4.44 How to Record Errors on the F-244. Record errors on the line which describes the type of error as you did in Stage I. For example, if you find that H20 is blank in the ED Book, tally the error on line 12 of the F-244. As you

conduct the review, you may notice errors in units other than those you are checking. See that the enumerator records these on his F-214 and corrects them.

Lines 61 through 64 of form F-244 consist of questions that can be answered "yes" or "no". A "no" means an error was made. Check "No" even if there is only one such error; otherwise check "yes".

If you check "no" when you find an error, continue to check for such errors. For example, "Is enumerator noting missing questionnaire entries on outer margin of ED Book?"; Check "no" for line 63 of the F-244 if the enumerator is failing to do this. However, continue to check for missing entries for all of the remaining housing units. Even though you check "no" after finding the first error, have the enumerator record all similar errors on his F-214 so that he will remember to correct them.

- 4.45 How to Select Units to be Reviewed. If the enumerator has not done enough work for you to review when you make a first or intermediate review, you may want to reschedule the review. However, do not permit enumerators to fall behind in their work.

- a. First review. Select the units for the first review from those listed on pages 1 through 4 of the Listing Book.

- (1) Section I Listing Book Review - Check all sample units listed on pages 1 through 4 of the Listing Book.

- (2) Section II Household Questionnaire Review - Select the first two sample units on page 4 of the Listing Book for which you have Household Questionnaires. If you do not have two such units on page 4, try to select them from pages 1 to 3. If there are no Questionnaires at all for this EA, when you make the review, omit this check. Enter "0" on line 7.

- (3) Section III ED Book Review - Housing Items. Select the first 4 sample housing units in the Listing Book that were completed by personal or telephone interview; that is, units that should have an entry in either column (14) or (14a) in the Listing Book and an "X" in column (16).

- (4) Section IV ED Book Review - Population Items. For this section review the population items for all persons in sample units selected for Section III.

- (5) Section V Listing Book - ED Book Comparison. Use the same units selected for Section III.

- b. Intermediate Review. The units for the intermediate review will be selected from those listed on pages 5 through 8 of the Listing Book. See paragraph 4.32b (2) of this manual.

- (1) Section I Listing Book Review. Check all sample units listed on pages 5 through 8 of the Listing Book.

- (2) Section II Household Questionnaire Review. Take the first two sample units on page 8 of the Listing Book for which you have Household Questionnaires. If you do not have two such units on page 8, try to select two from pages 5 to 8. If there is none enter "0" on line 7 of F-244.

- (3) Section III ED Book Review - Housing Items. Select the first 4 sample housing units listed on pages 5 through 8 of the Listing Book that were completed by personal or telephone interview; that is, units that should have an entry in either column (14) or (14a) in the Listing Book and "X" in column (16).

- (4) Section IV ED Book Review - Population Items. For this section, review the population items in all units selected for Section III.

- (5) Section V Listing Book - ED Book Comparison. Use the same units selected for Section III.

- c. Final review. In order to get a good cross-section of the enumerator's work you must select the units to be examined for the final review from 6 different pages of the Listing Book in accordance with the instructions which follow:

- (1) Item g of form F-244, shows how you are to select six pages in the Listing Book. Since there are 24 page numbers in the Listing Book, the numbers from one to twenty-four are shown in Item g in random order as follows:

20	17	23	2
10	4	3	11
18	6	22	15
12	1	14	8
16	19	24	7
21	5	13	9

When the enumerator comes in for the final review of an EA, look in the Listing Book for the last page on which a sample unit is listed. Then starting with the top line of item g, read across as if you were reading a book. Circle each number if there is a sample unit on that page of the Listing Book.

Stop when you have circled 6 page numbers in this way.

Do not circle a number if it is a page in the Listing Book which separates one ED from the next and has no sample housing unit.

Example. The last sample housing unit in the EA is on page 12 of the Listing Book. The remaining pages are blank. Circle the first six page numbers in the series if the number is 12 or lower:

20	17	23	②
⑩	④	③	⑪
18	⑥	22	15
12	1	14	8
16	19	24	7
21	5	13	9

You would select sample Listing Book pages 2, 10, 4, 3, 11, and 6 for review.

When you perform the checks called for in Sections I through V of F-244, you will review sample units on the various pages as follows:

- (a) Section I Listing Book Review. Inspect all sample units on each of the first 4 circled pages.

In the example, you circled pages 2, 10, 4, 3, 11 and 6. When you make the Listing Book checks in Section I, you would examine all sample units on pages 2, 10, 4 and 3 of the Listing Book; you would not examine units on pages 11 and 6.
- (b) Section II Household Questionnaire Transcription. Examine the first two sample units on the first page circled in item g of Household Questionnaires available for these units. Looking back at the example, you would examine the first two sample units on page 2 of the Listing Book.
- (c) Section III ED Book Review - Housing Items. Review the first sample housing unit on each of the last 4 Listing Book pages you circled in item g. These units must not have been completed by close-out procedure; that is, they should not have an "X" in column (17) of the Listing Book. In the example, you would have selected the first sample housing units on Listing Book pages 4, 3, 11 and 6.
- (d) Section IV ED Book Review - Population Items. Review the population items for persons in the same units selected for Section III.
- (e) Section V Listing Book - ED Book Comparison. Review the same units selected for Section III.

How to Make the Checks in Section I, F-244

- Line 1. If the enumerator has made some follow-ups on incomplete Household Questionnaires, see that he has entered either a "T" in column (14) or a "P" in column (14a). When he has attempted a telephone contact he should have made a small tally mark for each attempt in column (14) as well as a "T". Also check that the enumerator is filling column (15) of the Listing Book for units at which callbacks have been made.
- Line 2. Tally an error if a sample unit shows an entry for the number of persons in column (18) but there is no record of the Method of Completion shown in the Listing Book. Do not count an error if there is an "x" in both column (16) and column (17).
- Line 3. Compare the entry in column (12) of the Listing Book with the entry in column (18) for each selected sample unit. Tally an error each time you find a difference in any unit between the number of per-

sons entered in these two columns. However, do not tally an error for a unit when:

- (1) The head of household has changed.
- (2) The entire household has changed. There should be an entry in the remarks column of the Listing Book describing this type of change. See the green instruction sheet in front of the ED book.

Line 4. Enter the total number of errors you find in Section I on this line. Be sure the enumerator records any errors on his F-214.

4.47 Section II How to Make the Checks in Household Questionnaire Transcription. Ask the enumerator to find the Household Questionnaire forms for the two sample housing units you selected. Have him read you the entries on the Household Questionnaire starting with H17 for one unit at a time. Compare them with the ED Book entries. Use the following procedure when you review:

Line 5. Check the housing items first. Call out the housing item numbers to the enumerator in numerical order and have him read to you the Household Questionnaire entry. If there is no entry, he should say "blank". Do not ask him for items that are not required. For example, if the unit is "owned", do not ask for item H43. However, always ask him for the Questionnaire entries for items that require responses but are blank in the ED Book; he may have failed to transcribe. If you find that he did not transcribe a Household Questionnaire entry, tally on line 5 of the F-244. Also tally an error if the enumerator made a double mark, a bad FOSDIC mark or transcribed improperly.

Line 6. Review the population items for one person in the unit at a time. Have the enumerator read to you the Questionnaire entries for the population items starting with P3a. You may omit unnecessary items indicated by the instructions and the arrows on the ED Book pages. However, be sure that you ask the enumerator for all items in the ED book requiring entries, whether or not they are blank on the ED Book page. Make a tally mark on line 6 of the F-244 every time the enumerator fails to transcribe a Household Questionnaire entry. Also tally for double marks, bad FOSDIC marks, or when the enumerator transcribes an entry improperly.

Line 7. Enter the total number of errors tallied on line 5 and 6. Enter "0" if no Questionnaires were available.

Line 8. See that the enumerator is noting items requiring follow-up by marking the item numbers on the margin of the ED Book page. If he is failing to do so, point out that this type of error may cause him to forget about units requiring follow-up and seriously affect the quality of his work.

Line 9. Check "No" if the enumerator is not bringing Household Questionnaires with him for field review. You will need the questionnaires he has transcribed for making the checks on lines 5 and 6.

Do not tally an error, unnecessary entries made by the enumerator in the ED Book. However, advise the enumerator not to waste time doing unnecessary transcription. For example, if P24 is "Yes", P25 need not be answered. Be sure to correct in the ED Book every transcriptional error you find during this review. Correct each error immediately after you have tallied it on the F-244 and the enumerator has recorded it on his Record of Errors.

4.48 Section III ED Book Review - Housing Items. For each of the four sample housing units selected, review all the housing items in the ED book. Go through the housing items as if you were the enumerator conducting an interview. Examine only those items requiring entries. Each time the enumerator omitted a necessary housing item, or had made a double entry or bad FOSDIC mark, tally once on the appropriate line of Section III. Note that some housing items, such as H44, require several entries in order to be complete. Enter the total of all errors in Section III on line 31. See that the enumerator records his errors on his F-214.

4.49 Section IV ED Book Review - Population Items. In each of the four sample housing units you selected for Section III, review the population items for every person. Go through the population sections of the schedule as if you were an enumerator conducting an interview. Follow the instructions and arrows on the schedule to determine what population items need entries. Tally on lines 32 through 39 all omissions, double marks and bad FOSDIC marks. Also tally errors when written entries such as those required by items P8, P9 and P27 are not adequate. Note also that item P19 requires several FOSDIC marks in order to be complete. Enter the total number of errors in this section on line 60.

4.50 Additional ED Book Checks. The checks shown on lines 61 through 64 of the F-244 are very important. Keep these

QUALITY CONTROL OF THE FIELD ENUMERATION

checks in mind during the entire field review. If you check "no" for any line, see that the enumerator understands what he is doing wrong before he starts working again. Be sure these errors are noted on the enumerator's F-214.

- 4.51 Section V Listing Book - ED Book Comparison. Examine the entry in column (18) of the Listing Book for each of the four housing units you selected. If the number of persons in the ED Book for each unit is different from the entry in column (18), tally an error on line 65. It is also an error if a unit is "vacant" in the ED Book and column (18) is one or more persons.

- 4.52 Section VI How to Take Action. As in Stage I, after you review the enumerator's work according to Sections I through V of F-244, you will have to decide whether the enumerator will do satisfactory work or should be released. The action you take as a result of the review will depend on the number of errors you find in each of the five review sections.

In column (a) of Section VI, enter the total number of errors made by the enumerator in each of the review sections. Make these entries in the appropriate part of Section VI depending on whether you are conducting a first review, intermediate review, or final review.

Compare your entries in column (a) with the numbers printed in column (b). If your entry in column (a) is greater than column (b), circle the entry in column (a).

Next, look at column (c), "How to take action". When you have determined the action to take according to column (c) write your initials in column (d) next to that action.

a. How to take action after the first review

- (1) If there are no circled entries in column (a), the enumerator has apparently learned his job well and has made relatively few errors. Tell him his work will be reviewed again when he completes the EA.

Instruct him to complete his enumeration of the first EA. He may also start transcribing Household Questionnaire entries in his second EA, but must not make callbacks in it until he is instructed to do so unless this means he would have to stop working until his work is reviewed. Tell the enumerator to notify you as soon as he has completed the first EA so that you may schedule a final review of his first EA.

- (2) If 3 or more sections are circled in column (a), the Crew Leader will release the enumerator or the Field Reviewer will recommend to the Crew Leader that he be released.

Paragraphs 4.54 and 4.55 of this manual contain instructions on how to release enumerators and reassign EA's.

- (3) In all other cases schedule an intermediate review for this EA. Allow at least a day and a half for him to do enough additional work to be reviewed. Instruct the enumerator to transcribe Household Questionnaire entries for units listed on pages 5 through 8 of the Listing Book for the first EA. He must make at least one followup, either by telephone or personal visit, for each incomplete unit on those pages.

Record the time, date, and place of the intermediate review in part "F" of the F-244. Give the enumerator an F-242, Schedule of Field Appointments on which you will record the appointment information for the intermediate review.

b. How to take action after the intermediate review of the first EA

- (1) If there are less than 2 circles in column (a) of Section VI, tell the enumerator that his work will not be reviewed again until the final review of his first EA.

Instruct him to complete the first EA, making all necessary transcriptions and callbacks. He may also start transcribing Household Questionnaire entries in his second EA.

Have the enumerator notify you as soon as he has completed the first EA so that you can schedule a final review.

- (2) If there are 2 or more circles in column (a), the Crew Leader will release the enumerator or the Field Reviewer will recommend to the Crew Leader that he be released. Paragraph 4.54 and 4.55 of this manual contain instructions on how to release enumerators and reassign EA's

c. How to take action after the final review of every EA

- (1) If there are no circles in column (a), accept the EA as completed.

Using the form F-203 in the Listing Book, the Crew Leader will compute the payment the enumerator will receive for Stage I enumeration of this EA. Field Reviewers will not prepare payrolls; instead they will schedule a meeting with the Crew Leader.

Instruct the enumerator to make the transcriptions and callbacks necessary to complete any other EA's still in his possession.

Have him notify you when he completes his next EA so that you can schedule an appointment for a final review of that EA.

- (2) If there are one or more circles in column (a), the EA is not acceptable. Reassign this EA for review and correction. However, the Crew Leader will compute the enumerator's payment for all acceptable work in the Stage II enumeration of this EA on the form F-203 in the Listing Book.

Do not permit this enumerator to continue enumerating if he has been assigned any other EA's. He must be released according to the procedure in paragraph 4.54 in this manual. A Field Reviewer must recommend release to his Crew Leader in this case.

All other EA's assigned to this enumerator must be reassigned to another enumerator even if they are partially enumerated. See paragraph 4.55 for instructions.

- 4.53 Section VII Close-out Review. Since this review is to be made after the payroll computation, the Field Reviewer will not make this review unless directed to do so by the Crew Leader after the payroll computation is completed. Conduct the close-out review for each EA as soon as possible after its final review. Since the enumerator will not be present for this review, do this operation as soon as time permits between field reviews.

Line 66. Count the number of units in the EA which were completed by the close-out procedure and for which Household Questionnaires were not received. These units will have an "X" in column (17) of the Listing Book and a dash (-) in column (18). Tally these units and enter the total number on line 66 of the F-244.

Line 67. Count the number of units in the EA which were completed by the enumerator's close-out procedure and from which Household Questionnaires were returned. These units will have an "X" in column (17) of the Listing Book and an entry for the number of persons in column (18). Tally these units and enter the total number on line 67 of Form F-244.

Line 68. If the number of close-out units on line 66 is 4 or more, or if the number of close-out units on line 67 is 10 or more, you must assign the EA to an hourly-rate close-out enumerator. Be sure to note the assignment on your F-237, Crew Leader Record of Assignment (exhibit 1). Instruct this enumerator to make one additional personal visit to every close-out unit in the EA. If he is successful in finding a respondent at home in a unit, he is to verify the information already in the ED book and obtain information for the missing entries. If he cannot find anyone at home, he is to make no further visits to that unit. After making one visit to each close-out unit, he is to return the EA to you.

If the number of close-out units on line 66 is less than 4 and the number of units on line 67 is less than 10, the EA may be transmitted to the District Office since it has been completed.

Check the proper box on line 68 for the action you are taking and write your initial in the column beside it.

4.54 Releasing enumerators who do unacceptable work

- a. When to release an Enumerator. After you review the enumerator's work, you may decide, on the basis of the errors he has made whether to retain or release him. As in Stage I, any enumerator should be released if it is quite clear to you that he is doing poor work and it is unlikely that the quality of his work will improve.

- b. How to Release an Enumerator. Only the Crew Leader may release an enumerator. The Field Reviewer should, there-

fore, recommend the release of an enumerator to the Crew Leader if the results of a review so indicate.

- (1) If the Crew Leader makes the review, he will complete the payroll form with the enumerator and submit it to the District Office.
- (2) When the Field Reviewer recommends release, he will not complete the payroll form. He will instruct the enumerator not to do any more work and will make an appointment for the enumerator with the Crew Leader who will notify the enumerator of his release. The Crew Leader will complete the payroll form at that time.
- (3) The Crew Leader will collect all Census materials in the possession of the enumerator. He should collect the enumerator's official identification as well as the ED Books, Listing Books, EA maps and other Government property. The Crew Leader should have the Record of Field Review when he meets the enumerator to confirm the release action.

If the released enumerator does not have all the materials with him, the Crew Leader should arrange to pick them up.

Do not submit the payroll form until you have recovered all Census property from the released enumerator. If necessary, inform the enumerator that he cannot be paid until he has turned in all Census materials in his possession.

- (4) When you complete a payroll form before an EA is completed, insert a duplicate payroll form, F-203, in the Listing Book for the enumerator who completes the assignment.
- (5) How to Tell an Enumerator He is Released. You are required by the Census Bureau to release enumerators who do not do acceptable work. When the Crew Leader releases an enumerator he should make it clear that he is carrying out Census Bureau instructions. Below is a statement that the Crew Leader may use as a model when he releases an enumerator.

"The Record of Field Review shows you have made more than the allowable number of errors. According to Census Bureau rules, I am not permitted to let you continue enumerating."

Thank the enumerator and assure him that he will be paid for all work he has completed up to this point.

4.55 Reassigning EA's. Some enumerators may resign before they complete their assignments; others may be released for doing unacceptable work. In either case you must reassign the EA's they have not yet fully completed. You must also reassign for additional enumeration all completed EA's that have failed the close-out review.

- a. EA's which have not been started. Reassign piece-rate EA's to a piece-rate enumerator if no appreciable amount of transcription or other work has been done.
- b. EA's which have been started. If the original enumerator has already started work on an EA, reassign the EA to an hourly enumerator.
- c. EA's that failed close-out review. Always reassign these EA's to hourly enumerators for additional enumeration of close-out cases.

Record all reassignments of EA's in your F-237, Crew Leader Record of Assignments.

4.56 Correcting Errors Found During Final Review. After you complete the final review of an EA, make the following checks:

- a. If you accept the EA as completed, see that all errors on the Enumerator's Record of Errors, F-214, have been corrected before you send the EA to the District Office.
- b. If you return the EA to the enumerator for correction, check the F-214 after he has made all necessary corrections.
- c. If you reassign an EA to another enumerator because the original enumerator either resigned or was released for doing unacceptable work, you will see that all errors have been corrected on the original enumerator's F-214 as well as those on the replacement enumerator's F-214 before sending the EA to the District Office.

4.57 How to Make Your Daily Report of Field Review, F-239

- a. Who makes the Daily Report. You and the Field Reviewer should complete separate Daily Reports and mail them to

the District Office. However, on those days when the Field Reviewer is doing enumeration exclusively and does no field review work at all, he should not fill out an F-239. (Exhibit 7)

- b. When to complete the Daily Report. A Daily Report, F-239, must be completed for each work day during the Stage II enumeration until the last EA in your district is transmitted to the District Office. Complete the form after the last review of the day and mail it immediately afterwards.

Even if a Crew Leader does not do any review work during a working day, he is to complete and submit a Daily Report, F-239 using the back of the form to describe the activities for that day.

- c. How to complete the Daily Report.

- Item 1. Date. This entry should be the date of the field review work shown on the form.
- Item 2. District Office Number - The code number of your District Office.
- Item 3. State - The name of the State in which your District Office is located.
- Item 4. Name of Crew Leader - Enter the name of the Crew Leader.
- Item 5. Signature of the Person Who is Filling This Report. Sign your name in the appropriate box even if it appears in Item 4.

- d. How to Record Review Activity for Each Enumerator

1. Name of Enumerator - Enter the name of each enumerator whose work you have reviewed during the work day. All details of the review for each enumerator will be entered on the same line as his name. Be sure you use only the Stage II portion of the F-239 to record this information.
2. Enter the errors tallied in Section VI of the F-244 in column (b) through (f) of the F-239. Leave column (g) blank.
3. Field Review Action
 - (a) For first review, check column (h) if the enumerator passed. If he failed and was released, check column (i). Check column (j) if he requires an intermediate review.
 - (b) For intermediate review check column (k) if the enumerator passed. Check column (l) if the enumerator is released.
 - (c) For final review, check column (n) if the EA is acceptable.

If you release an enumerator, check column (o) and write the word "released" on the rest of the line. If this is his last EA which is unacceptable, check column (o) only.

4. Closeout Review. Since this review is to be made after the payroll computation, the Field Reviewer will not make this review unless directed to do so by the Crew Leader after the Payroll computation is completed. Make entries in these columns only after the final review of an EA when you have reviewed the closeout cases. Your entries on this part of form will be based on Section VII of the F-244.

- (a) If line 68 in Section VII is marked "no", check the column (p), "EA Accepted."
- (b) If line 68 in Section VII is marked "yes", check column (q), "EA Assigned to Closeout Enumerator."
- (c) Check only one of these two columns.

If you conduct a final field review for an enumerator on one day, and perform the closeout review on another day, record the final review on the Daily Report for the day on which it was conducted, leaving the closeout review columns blank. Make the entries for the closeout review in the Daily Report for the following day, leaving the other columns blank. Be sure to enter the enumerator's name on the reports for both days.

Count the number of checks in columns (h) through (l) and (n) through (q) for every Daily Report of Field Review. Note that you will have separate totals by type of review: First, Intermediate, and Final. Enter the closeout totals even though you make this review after the final review.

If less than 6 hours is spent on field review during the day, describe briefly your other census activities during that day on the reverse side of the Daily Report.

Appendix D.—OFFICE PROCEDURES SUPPLEMENT, DISTRICT OFFICE
MANUAL; TWO-STAGE AREAS (Extracts)

Office Procedures Flow Chart

Chapter I Introduction

- A. Procedures Covered in This Manual
- B. Who Will Conduct These Operations

Chapter III Stage I Office Operations

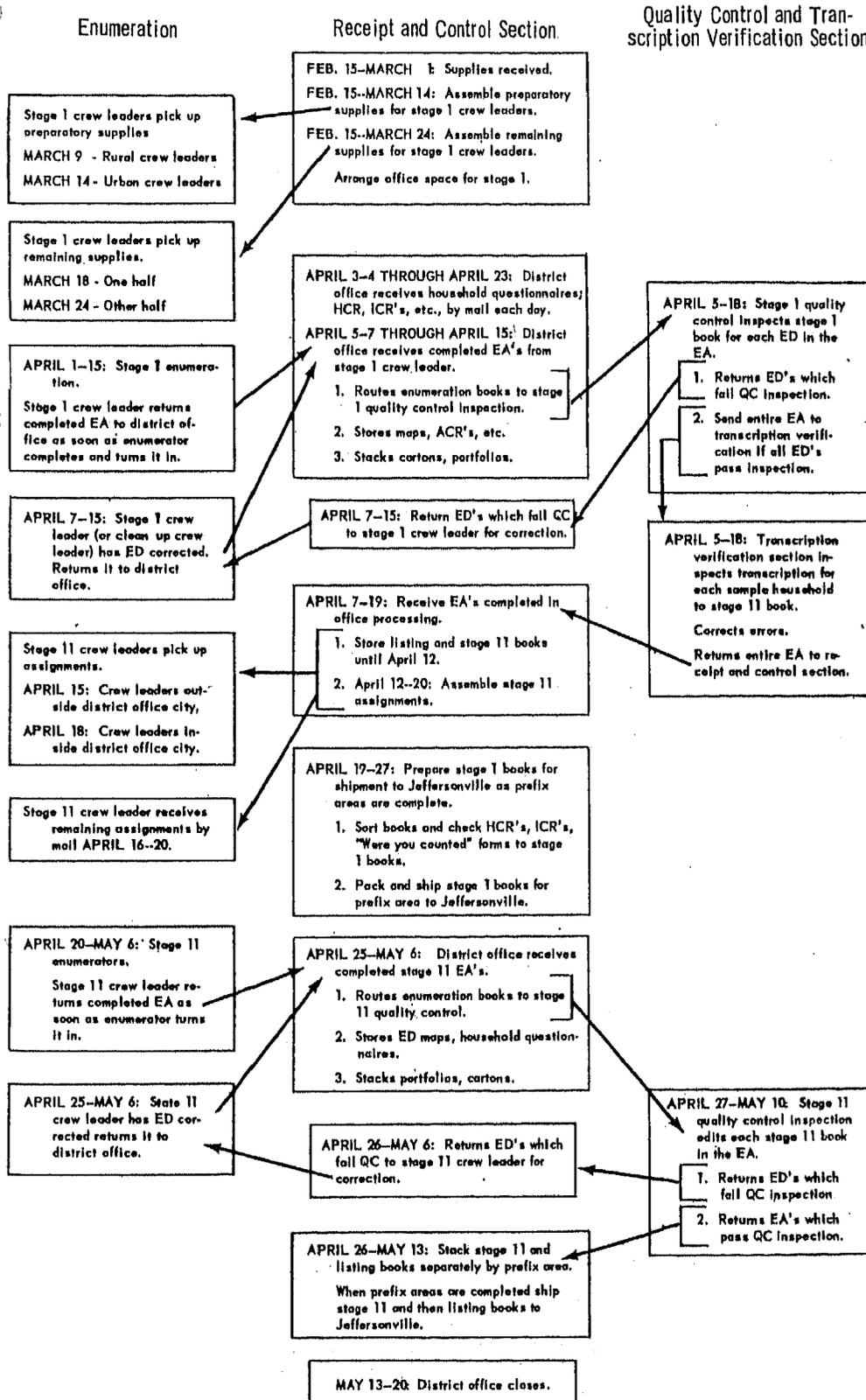
- C. Stage I Office Processing
 - 1. Quality Control of Stage I ED Books
 - 2. Verification of Transcription to the FOSDIC Stage II Books

Chapter IV Stage II Office Operations

- C. Stage II Office Processing
 - 1. Quality Control of Stage II FOSDIC Books

OFFICE PROCEDURES FLOW CHART

(Reference Office Procedures Supplement)



QUALITY CONTROL OF THE FIELD ENUMERATION

CHAPTER I. - INTRODUCTION

- A: PROCEDURES COVERED IN THIS MANUAL. This manual contains instructions to the Census District Office on carrying out its responsibilities for the supply of enumeration materials to the Crew Leaders and enumerators, and for the receipt, control, and inspection of the completed enumeration books, and their final shipment to the Jeffersonville office.

These responsibilities and the procedures by which they will be carried out are set forth in detail in the following chapters. In order to give a comprehensive view however, they are summarized as follows:

By the end of February the District Office will have received, in bulk shipments, most of the office supplies and enumeration materials that are required to conduct the census (a few items, necessary only in Stage II, will be received as late as March 15). As soon as these materials are received and checked in, the Supply Clerk will begin to assemble a separate lot or consignment of supplies for each Stage I Crew Leader. This lot will include all of the supplies that the Crew Leader requires in order to conduct the enumeration in his Crew Leader District. Certain preparatory materials, ED lists, ED maps, forms for recruiting enumerators, etc., will be assembled first, so that the Crew Leader can pick them up on the date of his preparatory training session (March 9 or 14). The remaining materials, enumeration books for each Enumeration District, portfolios, etc., will then be assembled so that the Crew Leader can pick them up on the date of his technical training session (March 18 or 24).

By March 25, Stage I Crew Leader supplies will have been distributed and the Census Office will be arranged to receive and process the completed enumeration books as they are returned by the Stage I Crew Leader. Three separate work sections will be set up; a Receipt and Control Section to receive, route, and ship the enumeration books; a Quality Control Section to inspect the completed enumeration books for completeness and accuracy (including payroll verification), and a Transcription Verification Section to inspect the transcription of sample items to the Stage II Books.

Stage I enumeration will begin on April 1. The Crew Leader will assign each enumerator one or more Enumeration Districts (EDs) as his Enumerator Assignment (EA). As soon as the enumerator completes the enumeration of these EDs satisfactorily, the Crew Leader will package the enumeration books for the EA and return them to the District Office. Complete EAs should begin to be received from the Stage I Crew Leader by April 6 or 7.

As soon as the EA is received and checked in, the enumeration books will be routed to the Quality Control Section. Clerks in this section will examine all of the Stage I Books (PH 1 or 2) in the EA, to make sure that they are complete and correct. If satisfactory, the EA will be sent to the Transcription Verification Section. Unsatisfactory EDs will be returned to the Crew Leader for correction.

The clerks in the Transcription Verification Section will examine the transcription of identifying information for the sample household to the Stage II Book (PH 3 or 4). Errors in transcription will be corrected and the EA will be returned to the Receipt and Control Section. The Stage I Books will be stacked, pending a check of HCRs, ICRs, and "Were You Counted" forms, and then will be shipped to Jeffersonville. The Stage II and Listing Books will be prepared (beginning April 12), for distribution to the Stage II Crew Leaders.

By April 15, Stage I enumeration should be complete. By April 18 or 19 most of the EAs should have been returned to the District Office and processed through Quality Control and Transcription Verification.

Starting April 12, the Supply Clerk will begin preparing those EAs that have completed office processing, for distribution to the Stage II Crew Leader. By April 20, most or all of the EAs should be packaged and distributed for Stage II enumeration. Stage II Crew Leaders will pick up those EAs which are ready for them, on April 15, or April 18. After that, EAs will be packaged and mailed to the Crew Leader as they are completed in office processing.

While the Office Operations Calendar shows the period between April 5 and April 19 as the time during which Stage I materials will be received and inspected, in actual practice 50-60% of the EAs may be returned in a relatively few days, probably between April 11, and April 15. This will pose a very real problem for the processing staff. EAs must be checked in and inspected very rapidly at this point, and the Stage II assignments prepared as quickly as the inspection is completed. Every effort must be made to get all of the EAs in the office, through office processing and back out for Stage II enumeration by April 19 or 20. In most cases this will mean the rapid addition of clerks to all three of the processing sections during this period. Competent enumerators, preferable those living in the District Office city, who have completed their Stage I assignments will be used as clerks (and paid as hourly rate enumerators). Clerks should be added as they are needed, so that there is no backlog in the work, but at the same time so that they will be fully employed. In many cases, it may prove necessary during this period to request permission from the Regional Office to hire more clerks than are authorized, but for fewer days, in order to get the job out on time. Some overtime work also may be required for all sections during this period.

Once the distribution of Stage II assignments is largely completed (April 19 or 20), HCRs, ICRs, and "Were You Counted"

Forms will be checked to the Stage I Books for each ED, in order to determine whether the persons listed on these forms were enumerated at home during the regular canvass. Missed persons will be added to the Stage I Books. Stage I Books for an entire prefix area (usually the county or a city of 50,000 or more persons) will then be packed and shipped as a single consignment to Jeffersonville. Clerks no longer needed in either the QC or TV Sections will be used to check HCRs, ICRs, etc. Clerks not needed for this purpose, and who are not needed as Stage II enumerators, will be placed on inactive status. They should be recalled during April 25 and May 8 as needed to assist in the Quality Control edit of Stage II Books. Those clerks needed to check HCRs, ICRs, etc. will be kept right on to process the completed Stage II assignments.

On April 20, Stage II enumeration begins. By April 25 or 26, EAs completed in Stage II should begin arriving back in the District Office. As in Stage I, the Receipt and Control Section will route the enumeration books to the Quality Control Section. Clerks in that section will inspect each Stage II Book for completeness and accuracy. Unacceptable EDs will be returned to the Stage II Crew Leader for correction. If acceptable, the EA will be returned to the Receipt and Control Section where the Stage II and Listing Books will be stacked, separately, for shipment to Jeffersonville. When books for all EDs in the prefix area are complete, the Stage II and the Listing Books will be packed separately and shipped in separate consignments to Jeffersonville.

By May 6 Stage II enumeration should be largely complete. By May 9 or 10 most or all of the Stage II assignments should have been returned to the District Office and have completed office processing. By May 13, the shipment of Stage II and Listing Books to Jeffersonville should be largely completed, and the Census office will close.

- B: WHO WILL CONDUCT THESE OPERATIONS. The Assistant District Supervisor (in larger offices) and the Administrative Clerk (in smaller offices) will be responsible for these operations. They will be assisted by:

1. A Supply Clerk who will head up the Receipt and Control Section (and will in turn be assisted by enumerators who have completed their Stage I assignments and who are being used as "clerks" being paid as hourly rate enumerators). The Supply Clerk will:
 - 1.1 Receive and maintain the necessary stocks of enumeration forms and supplies; will prepare and distribute supplies to the Crew Leaders.
 - 1.2 Establish and maintain a specified system for: the receipt and control of Enumeration Assignments completed in Stage I enumeration; routing these assignments through the Stage I Office Processing; preparing Stage II Enumerator Assignments; and for the preparation and shipment of completed Stage I Books to Jeffersonville.
 - 1.3 Maintain the system of receipt and control for the receipt of Enumeration Assignments completed in Stage II; routing these assignments through Stage II Office Processing; and finally preparing shipments of completed Stage II Books and Listing Books to Jeffersonville.
 - 1.4 Assist in the packaging and shipment of records, unused supplies, etc., when the Census Office is closed.
2. A Supervisory Clerk of the Quality Control Section will supervise the necessary number of QC clerks in an inspection of completed Stage I Books (and later, an inspection of the completed Stage II Books) for completeness and accuracy. All of the clerks in this section will be Stage I enumerators who have completed their assignments. They will be employed between April 5 and May 8, as required. One enumerator, especially competent, should be selected as the Supervisory Clerk.
3. A Supervisory Clerk of the Transcription Verification Section will supervise the necessary number of verification clerks in an inspection of the completeness and accuracy of the transcription of information from the Stage I to the Stage II Book. Here again all clerks will be former Stage I enumerators, one being selected as a supervisory clerk.

The remaining chapters of this manual describe in detail how each of these operations is to be carried out. While this manual is written for the direction of the Assistant Supervisor or Administrative Clerk, as the person in charge of these operations, it will be used by him to train those District Office employees under his direction, in their respective duties, and to provide them with a guide for their continued reference. (Note: Additional copies of those sections of this manual dealing with the Quality Control and Transcription Verification operations will be available for distribution to the clerks employed in those sections.)

(Note: In a few District Offices these procedures will be modified slightly in order to satisfy the needs of a special research and evaluation program which will be conducted during the Census. A specialist will be assigned by the Regional Office, to the offices concerned, in order to carry out this program with a minimum of interference with the regular Census Procedures. The Regional Office will inform appropriate District Supervisor of any modifications in space or personnel, required by the experimental programs.)

OFFICE PROCEDURES SUPPLEMENT, DISTRICT OFFICE MANUAL 117

C: **STAGE I OFFICE PROCESSING.** Before reading the detailed instructions for office processing, most of which are addressed to clerks and their supervisors, it may be well to become familiar with the flow of work in these operations. The major steps in Stage I office processing are shown below:

1. The Receipt and Control Section places EA's, by Crew Leader District, in bins in the QC Section.
2. Clerks take ED books for an EA from these bins, perform QC inspection and payroll verification, and deliver completed work to the QC Supervisory Clerk.
3. The QC Supervisory Clerk places accepted EA's, by Crew Leader, in bins in the Transcription Verification Section. Rejected ED books are returned to the Receipt and Control Section to be sent to Crew Leaders.
4. Verifiers take ED books from the bins, perform transcription verification, and deliver completed work to the Transcription Supervisor.
5. The Transcription Supervisor sees that rejected ED books are corrected in the office. He then returns completed books to the Receipt and Control Section.

Responsibility for maintenance of quality standards will rest with the Technical Officer, since quality control is one of his two major functions. He will train the Stage I QC Supervisory Clerk and the Transcription Supervisor. However, he will not always be available in the office because part of his time must be spent in the field on quality control of field review and part of it must be spent on training, which is his other major function. Consequently, the Assistant District Supervisor and/or the Administrative Clerk will be responsible for the general supervision of all office operations.

1. QUALITY CONTROL OF STAGE I ED BOOKS.

- 1.1 **GENERAL.** There are two reasons for having a quality control (QC) operation. One is to locate and reject incoming Stage I ED books which have too many errors or omissions. The other is to identify Crew Leaders and field reviewers who are not submitting acceptable books. Accordingly, the QC Supervisory Clerk will keep records of inspection separately not only by ED but also by the Crew Leader or field reviewer who conducted the final review.

Stage I ED books will be received from the Receipt and Control Section along with Listing Books and Stage II ED Books. The QC operation will consist of checking the completeness of entries in these books. Each QC Clerk should be able to handle ED books for about twelve to sixteen EA's a day. If a sizeable backlog occurs in the operation, other clerks should be brought in to assist.

After QC, EA's which pass will be delivered to the Transcription Verification Section. ED books which fail will be returned to the Receipt and Control Section, along with the Listing Book and Stage II Book. If part of an EA fails and part does not, the ED books which passed will be stored in the QC Section until those that failed return from the field.

1.2 FORMS REQUIRED.

Forms F-267, Office QC Record for PH-1;
Forms F-268, Office QC Record for PH-2;
Forms F-269, Office Payroll Verification Record for PH-1 or PH-2.

1.3 SPECIFIC INSTRUCTIONS FOR QC SUPERVISORY CLERK.

- 1.31 **How to assign ED books to clerks.** As the books for an EA arrive in the office, the Receipt and Control Section will place the entire EA in your section, using a different bin for each Crew Leader District.

Make up a Form F-267, Office QC Record for PH-1, or F-268 Office QC Record for PH-2, for each Crew Leader and each field reviewer. Prepare a Form F-269, Office Payroll Verification Record for PH-1 or PH-2, for each Crew Leader and each field reviewer. Put these forms, by Crew Leader District, in the same bins where the EA's will be placed by the Receipt and Control Section.

Tell clerks to take an EA and the accompanying forms as they need work. If the F-269, Daily Report of Field Review shows that the final review was done by the Crew Leader, the clerk should take the F-267 and F-269 or F-268 for the Crew Leader, and leave the field reviewer forms in the bin, or vice versa. Instruct clerks to return the forms to the appropriate bin when they finish and to take work from a different bin the next time. We want to have each clerk inspect the work of as many different Crew Leaders and field reviewers as possible.

Train each clerk thoroughly in the instructions in section 1.4, using completed ED books for illustration.

- 1.32 **How to control Crew Leader records.** As clerks turn in ED books, examine the Form F-267 or F-268 to see that it has been filled correctly. Notify the Technical Officer when there is an "R" (for reject) in the last column.
- 1.33 **How to process completed ED books.** Verify that the counts on page 27 of the Listing Book have been posted correctly

to the ED book labels. Make changes on the label as required.

When an EA passes QC, remove Form F-203, Enumerator's Reimbursement and Payroll Voucher, and Form F-202, Enumerator's Work and Expense Record, from the Listing Book and give them to the Administrative Clerk. Then deliver the entire EA (Stage I Book, Stage II Book, and Listing Book) to the Transcription Verification Section. Note that you must wait until all ED's in an EA have passed QC before the EA is ready to be delivered to transcription verification. Make delivery by placing books yourself in Crew Leader bins in that section. Put new books on the bottom of each pile.

When any ED book in an EA fails QC, send it to the Receipt and Control Section, identifying it with a note as a "Fail QC" book; send the Stage II book and Listing Book as well. (The Receipt and Control Section will return it to the Crew Leader for correction). Note that in EA's with more than one ED, some of the ED's may fail while the others pass. If this happens, store those that passed (Stage I and Stage II books) in your section until those that failed QC return from the field. Make a list of the ED's that you have stored. As "Fail QC" books return from the field, check your list to see if you have any other parts of the EA.

When an EA fails the office closeout check (see section 1.41c), return the entire EA to the Receipt and Control Section with this note attached:

"To Crew Leader,

This EA is being returned because of an excessive number of housing units completed by the closeout procedure. Assign the EA to an hourly enumerator to make one more visit to each closeout unit."

An EA must not be sent back to the field for failing the closeout check a second time. Section 1.41c describes the procedure for avoiding this.

When a clerk gives you an EA because of torn pages, creased pages, or marks in the margin, show it to the Technical Officer. He will decide whether or not to transfer the information to a new book. If he decides to do so, the transferring will be done in your section. However, it is not to slow your operation. Either request more help to get this done or else wait until all other EA's have been processed.

- 1.34 **How to supervise your operation.** Although your clerks will be doing the actual work in your section, you are responsible for the quality and quantity of work produced.

After you have trained your people, you cannot assume that they have understood and are following the instructions. You will have to observe each one on the job, by sitting down beside him and watching him review an ED or two. See that each person is doing the job correctly, and give additional training to those who need it.

Then go over an ED completed by each of your clerks. Find out what his sample pages were in the ED, and, without looking at his F-267 or F-268, inspect the same pages yourself and compare your tally of errors with his. Then talk him on his weak points. Do this only once for each clerk who is doing a good job, but repeat as often as necessary for clerks who are not doing a good job according to this check.

Even clerks who are following instructions may not be working rapidly enough. This may be because they are just naturally slow, but more often it may be because they have not found an efficient way of working. You will have to see that they are not making waste motions or doing more checking than the instructions call for. It may be necessary to release and replace some clerks who fail to learn the job or are unable to work efficiently.

Watch closely the number of unprocessed books in your section. Ask the Technical Officer for more clerical help if your work builds up faster than you can handle it. Since the success of the Census depends on a rapid count in Stage I, it is important to avoid any delay in processing.

Once you are satisfied that your clerks are working well, you may find time to do some of the processing yourself. But this should wait until all other aspects of your job are under control.

1.4 SPECIFIC INSTRUCTIONS FOR STAGE I QC CLERKS.

1.41 Preparing for QC.

- a. Select an EA from one of the bins. Wherever possible, select the bin for a Crew Leader District which you have not yet reviewed. Determine whether the signature in Part B on Form F-203 in the Listing Book is that of the Crew Leader or the Field Reviewer. If it is the Crew Leader's, take his Form F-267 and F-269 or F-268 from the bin. If it is the Field Reviewer's, take his two forms from the bin.
- b. Check the general appearance of each Stage I book. Look for:

QUALITY CONTROL OF THE FIELD ENUMERATION

1. torn pages
2. creased pages
3. marks in the margin

Give EA's containing books with these defects to your supervisor immediately. The FOSDIC machine will not be able to "read" them.

- c. Examine the Listing Book to determine the number of closeout housing units and total housing units in the EA. A closeout unit is identified by an "X" in column (11) of pages 1-24. The column total appears at the bottom of each page. The total number of enumerated housing units is shown in column (6) on page 27.

Divide the total number of housing units by the number of closeout units. If the result is 5 or greater, proceed to the next step. If the result is less than 5, write "fail closeout" on page 1 of the Listing Book under column (11) at the very bottom of the page. Then give the EA to your supervisor immediately for return to the field.

If a book has an entry of "fail closeout" on page 1 of the Listing Book under column (11) when it reaches you, you do not need to make the above check again. An EA will not be sent back to the field a second time for failing closeout.

- d. Enter the ED number in column a of Form F-267 or F-268 and enter your last name in column b.

Treat a book which has previously failed QC and is going through the operation again as if you were receiving it for the first time. Treat large ED's having more than one book in the same way you treat ED's with one book.

You are not to look at every housing unit and every item. We only have enough time and money to inspect a sample of housing units and items. Therefore, make no checks except those specified below.

1.42 How to count errors for schedule PH-1.

- a. Examine the pages listed in column c of Form F-267. Continue the sampling pattern by examining every 30th page throughout the Stage I ED book (or books).
- b. After examining each page, write down on a piece of scratch paper the number of housing lines and population lines on that page. For example, if there are 16 population lines and 4 housing lines on a page, write down "20". When you finish the ED, you will add these numbers to get the total number of lines that you looked at.
- c. Tally any errors as you find them in columns d-1 of Form F-267 as discussed below. Do not correct the errors which you find. Use this system of tallying:

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That is to say, use vertical marks for the first four errors and a slanted mark through the four for the fifth error. Then repeat. Since the FOSDIC machine will not "read" lightly marked circles, count light marks as omissions.

- col. d Tally an error if items P1 and H1 are not identical for the same unit.
- col. e Tally an error if there is no entry of head in item P3 for every A, B, C, or D in item P1, unless the unit is vacant or "VAC-URE".
- col. f Look at items P3 to P7, one line at a time, for lines which are not marked "vacant" or "vac-ure". Place a ruler under each line in turn and look for seven FOSDIC marks. Tally one error if one mark is missing or if there are too many. Tally two errors when two marks are missing; three errors when three marks are missing; etc.

Make no checks on population lines which are marked "vacant" or "vac-ure".

- col. g Look at items H3 to H11, one line at a time, for lines which are not marked GQ in item H1. Place a ruler under each line in turn and look for nine FOSDIC marks. Tally one error whenever one mark is missing or there are too many. Tally two errors when two marks are missing, three errors when three marks are missing, etc.

Make no check on lines which are marked "GQ."

- col. h Tally an error if there is no entry in item H12 when item H7 is marked "occupied."

- col. i When item H7 is marked "vacant," tally an error for every blank in item H13.

1.43 How to count errors for schedule PH-2

- a. Examine the pages listed in column c of Form F-268. Continue the sampling pattern by examining every 30th page throughout the Stage I ED book (or books).

- b. After examining each page, write down on a piece of scratch paper the number of housing lines and population lines on that page. For example, if there are 16 population lines and 4 housing lines on a page, write down "20." When you finish the ED, you will add these numbers to get the total number of lines that you looked at.

- c. Tally errors as they occur in column d-e of Form F-268, as discussed below. Do not correct the errors which you find. Use this system of tallying:

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That is to say, use vertical marks for the first four errors and a slanted mark through the four for the fifth error. Then repeat. Since the FOSDIC machine will not "read" lightly marked circles, count light marks as omissions.

- col. d Tally an error if there are less than three FOSDIC marks in item 1.

- col. e Tally an error if items P1 and H1 are not identical for the same unit.

- col. f Tally an error if there is no entry of "Head" in item P3 for every A, B, C, or D in item P1, unless the unit is vacant or "VAC-URE".

- col. g Look at items P3 to P7, one line at a time, for lines which are not marked "vacant" or "VAC-URE". Place a ruler under each line in turn and look for seven FOSDIC marks. Tally one error if one mark is missing or if there are too many. Tally two errors when two marks are missing, three errors when three marks are missing, etc.

Make no check on population lines which are marked "vacant" or "VAC-URE".

- col. h Look at items H3 to H11, one line at a time, for lines which are not marked GQ in item H1. Place a ruler under each line in turn and look for nine FOSDIC marks. Tally one error if one mark is missing or there are too many. Tally two errors when two marks are missing; three errors when three marks are missing, etc.

Make no check on lines which are marked "GQ".

- col. i Tally an error if there is no entry in item H12 when item H7 is marked "occupied".

- col. j Tally an error if there is no entry in item H14 when item H12 is marked "owned".

- col. k Tally an error if there is no entry in item H15 when item H12 is marked "owned" and item H14 is marked "1 unit, no business."

- col. l Tally an error if there are not three FOSDIC marks in item H16 when item H12 is marked "rented".

1.44 How to fill the summary section of both QC record forms. Fill the summary sections of Forms F-267 and F-268 in the same way, as follows:

- a. Add the tallies in the tally of errors section and enter the total in the total errors column.
- b. Obtain the total number of housing lines and population lines on the sample pages that you looked at by adding the numbers you have recorded on your scratch paper. Post the number in the total lines column.
- c. Compare total errors and total lines. If the total number of errors is more than half of total lines, enter "R" (for reject) in the A or R column to signify that this ED has failed QC. If total errors are half of total lines or less, enter "A" (for accept) to signify that this ED has passed QC.

1.45 How to process rejected EDs. If you enter an R in the last column of Form F-267 or F-268, do the following:

- a. Look at column 11 on pages 1-24 of the Listing Book for the housing units which you have examined during QC.
- b. Identify each unit marked with an X in column 11. Repeat the QC process for these units, tallying errors in red pencil on the same line of the F-267 or F-268.
- c. Subtract the number of red tallies from the original number of errors. Correct the total errors column accordingly by crossing out the previous total with a single red line and entering the new total alongside.
- d. Using the new total, decide whether A or R should be entered in the last column. If it is still R, make no change in the last column. If it is now A, draw a single red line through the R and enter A in red.

OFFICE PROCEDURES SUPPLEMENT, DISTRICT OFFICE MANUAL 119

- 1.46 How to verify payroll counts. You will have a Form F-287, Office Payroll Verification Record for PH-1 or PH-2, for each Crew Leader and Field Reviewer. Follow the instructions on the form, step by step. The purpose of this check is to verify that the numbers of persons and housing units claimed on Form F-203, Enumerator's Reimbursement and Payroll Voucher, are correct. Since a complete verification would be too expensive, sampling inspection and other methods of control will be used.

The steps described in detail on Form F-287, Office Payroll Verification Record for PH-1 or PH-2, will not be repeated here. But the following is a general picture of the operation:

- One FOSDIC page out of every twenty is inspected to verify that the population count for the page matches the number of persons on that page in column (12) of the Listing Book. If an error is found, the entire FOSDIC book is checked in the same manner.
- The addition of persons is checked on every third page of the Listing Book. If an error is found, then the addition is checked on every page.
- The addition is checked on page 27 (the summary page) of the Listing Book in both the population and housing columns.
- Total population and housing unit counts for each ED are posted on the ED label of the appropriate Stage I ED Book.

When you finish payroll verification for an EA, check lines 2 and 5 in column h of Part A of the Form F-203. Then put the Stage I ED books, Stage II ED books, and Listing Book together, and give them to your supervisor.

- 1.47 Turning in work to the Supervisory Clerk. When you turn ED books in to the QC Supervisory Clerk, separate books which have failed and books which have passed QC. Show the Supervisory Clerk your Forms F-267 and F-268 and Forms F-287 for the books which you are returning. Then return the forms to the appropriate Crew Leader bin and select work from a different bin.

2. VERIFICATION OF TRANSCRIPTION TO THE FOSDIC STAGE II BOOKS

- 2.1 GENERAL. The purpose of the transcription verification operation is to insure that the Stage II books prepared by enumerators and reviewed by Crew Leaders are of acceptable quality. The operation will be directly supervised by a clerk who will work under the direction of the Administrative Clerk or Assistant District Supervisor. In most instances one of the better enumerators will be given an appointment as a GS-3 clerk and given special training to serve as supervisor of this section.

2.2 FORM REQUIRED:

Form F-278, Office Verification of Transcription to PH-3 or PH-4.

2.3 SPECIFIC INSTRUCTIONS FOR TRANSCRIPTION SUPERVISOR

- 2.31 How to assign books to clerks. The QC Supervisory Clerk will deliver EA's to you by placing each Crew Leader's ED books in a different bin in your section. Your verifiers will obtain work by taking EA's for certain Crew Leaders directly from these bins.

Make up a Form F-278, Office Verification of Transcription to PH-3 or PH-4 for each Crew Leader. Enter his name and Crew Leader District Number in the heading. Put these forms, by Crew Leader, in the bins in which EA's will be placed by the QC Supervisory Clerk.

Tell verifiers to take the ED books for an EA, and the accompanying form, as they need work. Instruct them to return the form to the appropriate bin when they finish and to take work from a different bin the next time. We want verifiers to inspect the work of as many different Crew Leader Districts as possible.

Train each verifier thoroughly in the instructions in section 2.4, using a completed book for illustration. Do not assume that verifiers know how to transcribe, even though they are former enumerators. They may have been making errors as enumerators which were not caught in field review.

2.32 How to process completed books

- When an EA fails transcription verification, notify the Technical Officer immediately so that he may take corrective action by telephoning the Crew Leader. Then follow the instructions in section 2.33.
- When an EA passes transcription verification, turn to page 27 of the Listing Book. Divide the number of persons in the EA (column 4) by the number of persons transcribed (column 7). Then divide the number of enumerated housing units in the EA (column 6) by the number of housing units transcribed (column 8).

If the Housing result is between 3.9 and 4.1 and the Population result is between 3.4 and 4.6, no further check is required. Enter your initials in the upper right corner of page 27 to show that you made the check. If either result is not between these limits, verify the counts in column 7 and 8 of page 27 by checking the Stage II Book against the Listing Book. Correct page 27 as required.

Next, post population and housing counts for each ED on Form F-322, ED Control Register. The columns to be filled on F-322, together with the sources, are shown below:

Column on Form F-322	Column on page 27 of the Listing Book
1960 population count	Total persons (col. 4)
1960 housing count	Total housing units enumerated (col. 6)
1960 population sample	Persons transcribed (col. 7)
1960 housing sample	Housing units transcribed (col. 8)

Then deliver the entire EA to the Receipt and Control Section.

- 2.33 How to handle EA's which fail verification. Examine ED books in the EA's which failed, to see if the Stage II book must be done over completely or if repair work is sufficient. Have the verifiers make the corrections, but defer work on such EA's until the other EA's have been processed so that the flow of work will not be interrupted.

Specific instructions cannot be written for determining when a book must be done over completely and when it merely needs patching. This will be your decision, although you may want to get the Technical Officer's advice. There are some general guidelines, however. If many housing units have been omitted or transcribed out-of-order, it would probably be better to start over. If the main difficulty is omissions or wrong entries, it would probably be advisable to repair the book by entering the necessary FOSDIC marks and correcting those in error.

If the decision is made to repair an ED book rather than do it over completely, the verifier who repairs the book should check each sample housing unit or sample GQ person from start to finish. Omitted housing and population entries should be added and the rules for missing sex, color, and marital status entries should be followed. Correct errors by erasing the wrong FOSDIC mark and entering the right one (or cancelling), following the instructions in the enumerator's manual.

If the number of persons or housing units transcribed changes as a result of repair work, correct the entries in columns (7) and (8) on page 27 of the Listing Book.

- 2.4 SPECIFIC INSTRUCTIONS FOR VERIFIERS OF TRANSCRIPTION TO FOSDIC STAGE II BOOKS. The purpose of this operation is to verify that the information for sample housing units (and sample GQ persons) in the Stage I book has been transcribed correctly to the Stage II book. Books which do not pass verification will be corrected in the office.

- 2.41 Obtaining work. Select an EA and a Form F-278, Office Verification of Transcription to PH-3 or PH-4 from one of the bins. Wherever possible, select a bin for Crew Leader District which you have not yet verified.

2.42 Verifying

- Record the EA number in column a of Form F-278 and the number of housing units, which you will find on the ED book labels, in column b. Consult the sampling table on F-278 to see which sample units and persons in the Stage I book to select for verification. Select the sample from item P1 of the Stage I book.

If there are 409 housing units in the EA, for example, you would select the second sample housing unit (or sample GQ person) in item P1 and every 7th sample housing unit (or sample GQ person) in item P1 thereafter. In counting to get every 7th unit, you would include in your count housing units with an "A" sample key in item P1 and GQ persons on starred lines in item P1. For example, if you were to find six "A" housing units followed by a GQ person on a starred line, the unit to be verified would be the GQ person. If you then were to find three GQ persons on starred lines followed by four A housing units, the next unit to be verified would be the fourth of the A housing units. In other words, take every 7th unit whether it happens to be housing unit with an "A" sample key or a GQ person on a starred line.

QUALITY CONTROL OF THE FIELD ENUMERATION

The sampling table has been arranged so that about 14 to 16 housing in each EA.

- b. Verify the transcription for each sample housing unit (or QC person) by comparing the Stage I and Stage II entries. Compare housing entries and population entries for each person in the sample housing unit. If the wrong housing unit has been transcribed or person has been omitted, stop verifying and enter an R in column d. Ignore errors in spelling of names but count every marking error whether it is an erroneous entry or an omission. Tally errors in column e, using this system of tallying:

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That is to say, use vertical marks for the first four errors and a slanted mark through the four for the fifth error. Then repeat.

- c. As soon as you find 25 errors in an EA, stop verifying the EA immediately. Enter an R in column d, enter your last name in column e, return the EA to your supervisor, and notify him that it has failed verification. If you do not find as many as 25 errors in an EA, enter an A in column d, enter your last name in column e, and return the EA to your supervisor.
- d. Show your supervisor the Form F-278 for the EA which you have just completed. Then return it to the appropriate bin and select an EA from a different bin.

C. STAGE II OFFICE PROCESSING

1. QUALITY CONTROL OF STAGE II POSDIC BOOKS

- 1.1 GENERAL. The QC operation for Stage II will be similar to that for Stage I. POSDIC Books with too many errors will be rejected and sent back to the field. Inspection records will be maintained on a Crew Leader or Field Reviewer basis so that Crew Leaders and Field Reviewers who are not submitting acceptable books will be identified.

QC will consist of checking the completeness of entries in these books. Each QC clerk should be able to process about 16 EA's a day. If a sizeable backlog occurs in the operation, other clerks should be brought in to assist.

The Technical Officer will be responsible for Stage II office processing. He will train the Stage II QC Supervisory Clerk. Although he will be spending some time in the field on quality control of field review, he should be able to spend more time on Stage II office quality control than he did on Stage I office QC. The Assistant District Supervisor and/or the Administrative Clerk will supervise the operation when the Technical Officer is not present.

1.2 FORM REQUIRED:

F-280, Office QC Record for PH-3 or PH-4

1.3 SPECIFIC INSTRUCTIONS FOR QC SUPERVISORY CLERK

- 1.31 How to assign books to clerks. The Receipt and Control Section will place ED books for completed EA's from each Crew Leader District in a different bin in your section. The Listing Book will accompany Stage II books.

Make up a Form F-280, Office QC Record for PH-3 or PH-4, for each Crew Leader and Field Reviewer. Put these forms, by Crew Leader District, in the bins in which EA's will be placed by the Receipt and Control Section.

Tell clerks to take an EA and the accompanying form as they need work. If the F-239, Daily Report of Field Review shows that the final review was done by the Crew Leader, the clerk should take the F-280 for the Crew Leader and leave the Field Reviewer form in the bin, or vice versa. Instruct clerks to return the form to the appropriate bin when they finish and to take work from a different bin the next time. We want to have each clerk inspect the work of as many different Crew Leaders and Field Reviewers as possible.

Train each clerk thoroughly in the instructions in section 1.4, using a completed book for illustration.

- 1.32 How to control Crew Leader records. As clerks turn in books, examine the F-280 to see that it has been filled correctly. Notify the Technical Officer when there is an R in the last column.
- 1.33 How to process completed books. Verify that the counts on page 27 of the Listing Book have been posted correctly to the ED book labels. Make changes on the label as required.

When an EA passes QC, remove Form F-203, Enumerator's Reimbursement and Payroll Voucher, and Form F-202, Enumerator's Work and Expense Record from the Listing Book and give them to the Administrative Clerk. Then send the entire EA to the Receipt and Control Section. Note that you must wait until all ED's in an EA have passed QC before the EA is ready to be delivered to Receipt and Control.

When any ED book in an EA fails QC, send it together with the Listing Book to the Receipt and Control Section with a note saying "Fail QC." (The Receipt and Control Section will return it to the Crew Leader for correction.) Note that in EA's with more than one ED, some of the ED's may fail while the others pass. If this happens, store those that passed in your section until those that failed QC return from the field. Make a list of the ED's that you have stored. As "Fail QC" books return from the field, check your list to see if you have any other parts of the EA.

When a clerk gives you an EA because of torn pages, creased pages, or marks in the margin, show it to the Technical Officer. He will decide whether or not to transfer the information to a new book. If he decides to do so, the transferring will be done in your section. However, it is not to slow your operation. Either request more help to get this done or else wait until all other EA's have been processed.

- 1.34 How to supervise your operation. Although your clerks will be doing the actual work in your section, you are responsible for the quality and quantity of work produced.

After you have trained your people, you cannot assume that they have understood and are following the instructions. You will have to observe each one on the job by sitting down beside him and watching him review an ED or two. See that each person is doing the job correctly, and give additional training to those who need it.

Then go over an ED done by each of your clerks. Find out what his sample starting page was in the ED, and, without looking at his F-280, inspect the same pages yourself and compare your tally of errors with his. Then train him on his weak points. Do this only once for each clerk who is doing a good job, but repeat as often as necessary for clerks who are not doing a good job according to this check.

Even clerks who are following instructions may not be working rapidly enough. This may be because they are just naturally slow; but more often it may be because they have not found an efficient way of working. You will have to see that they are not making waste motions or doing more checking than the instructions call for.

Watch closely the number of unprocessed books in your section. Ask the Technical Officer for more clerical help if your work builds up faster than you can handle it. The success of this operation depends on quick identification of poor ED's and Crew Leaders with high error rates so that immediate action can be taken.

Once you are satisfied that your clerks are working well, you may find time to do some of the processing yourself. But this should wait until all other aspects of your job are under control.

1.4 SPECIFIC INSTRUCTIONS FOR STAGE II QC CLERK:

1.41 Preparing for QC

- a. Select an EA from one of the bins. The Listing Book will accompany Stage II books. Look at Form F-203 in the Listing Book. The signature in part B will tell you whether the Crew Leader or the Field Reviewer conducted final review. Select the Form F-280 for that person from the bin.
- b. Examine the general appearance of each Stage II book. Look for:
1. torn pages
 2. creased pages
 3. marks in the margin
- Give books with these defects to your supervisor immediately. The POSDIC machine will not be able to "read" them.
- c. Enter the ED number in column a of Form F-280 and enter your last name in column b.

Treat a book which has previously failed QC and is going through the operation again as if you were receiving it for the first time. Treat large ED's having more than one book in the same way you treat ED's with one book.

OFFICE PROCEDURES SUPPLEMENT, DISTRICT OFFICE MANUAL 121

You are not to look at every housing unit and every item. We only have enough time and money to inspect a sample of housing units and items. Therefore, make no checks except those specified below.

1.42 How to count errors

- a. As you know from your experience as an enumerator, each sheet in the Stage II book has room for housing information and the population information for three persons. Count sheets in the Stage II book until you come to the one specified in column c of Form F-280. If there are any entries in items H1 to H13 on this sheet, select this housing unit and the persons in it. Otherwise select the next housing unit and the persons in it.

Before reviewing the unit, check pages 1-24 of the Listing Book to see if the unit has an X in column 17 with columns 16 and 18 blank. If so, do not review the unit. Otherwise, review the unit.

Then count 12 more sheets and select another unit the same way. Continue the sampling pattern (every 12th sheet) throughout the book.

- b. As you finish reviewing each housing unit, write down on a piece of scratch paper the number of housing sections and population sections in that housing unit. For example, if there are 4 persons in the housing unit, you would write down "5", since there are four population sections and one housing section. When you finish the ED, you will add these numbers to get the total number of sections that you looked at.
- c. Tally errors as you find them in columns d-k of Form F-280 as discussed below. Do not correct the errors which you find. Use this system of tallying:

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That is to say, use vertical marks for the first four errors and a slanted mark through the four for the fifth error. Then repeat. Since the FOSSDIC machine will not "read" light FOSSDIC marks, count light marks as omissions.

- col. d. Item H7 tells you whether or not a unit is occupied. If H7 is blank, the presence of population entries will show that the unit is occupied.

Note that there are two different kinds of housing sections in a Stage II book. One kind has a (20) in the Form number box in the upper left corner of the page. This kind requires 6 FOSSDIC marks in the group H19 to H24 on Form PH-4 and 7 FOSSDIC marks on Form PH-3.

The other kind has a (5) in the Form number box in the upper left corner of the page. This kind requires 12 FOSSDIC marks in the group H19 to H24 for both PH-3 and PH-4.

Examine questions H19 to H24 for occupied units. Look for either 6, 7, or 12 FOSSDIC marks, depending upon which kind of Form and page you have. Tally one error whenever one mark is missing or there are too many. Tally two errors when two marks are missing, three errors when three marks are missing, etc.

- col. e. An owned unit has an entry of "Owned or being bought" in H12. Tally an error if there is no entry in item H15 for owned units when item H14 is marked "1 unit, no business".
- col. f. A rented unit has an entry of "Rented" in H12. For rented units examine question H16. Look for three FOSSDIC marks. Tally one error whenever you have anything other than three FOSSDIC marks.
- col. g. Examine questions H43 and H45 for rented units. Look for three FOSSDIC marks in H43 and one in H45. Tally one error whenever one mark is missing or there are too many. Tally two errors when two marks are missing, three errors when three marks are missing, and four errors when all four marks are missing.
- col. h. Look for entries in P8 and P10 to P13a for each person. Tally one error for each entry which is missing.

- col. i. Month and year of birth appear in item P6. Look for one entry in P14 and one in P11 for each person born before April, 1955. Tally one error for each entry which is missing.

- col. j. When P22 is "you" or blank, look for entries in P23 and P27-P30. Tally one error for each entry which is missing. If all entries are missing, tally nine errors. There should always be four entries in P27 except for members of the armed forces.

- col. k. When P30 is "yes", look for entries in P31-34. Tally one error for each entry which is missing.

1.43 How to fill the summary section of Form F-280

- a. Add the errors in column d-k. Enter this total in column l.
- b. Enter in column m the number of housing sections and population sections you examined.
- c. Divide the entry in column m by the entry in column l and enter the result in column n. If the entry in column l is zero, simply enter 4.00 in column n.
- d. If the entry in column n is greater than 1.50, enter "A" (for accept) in column o to signify that this ED has passed QC. Otherwise, enter "R" (for reject) in column o to signify that this ED has failed QC.

1.44 How to verify payroll counts

- a. Turn to page 27 of the Listing Book. Verify that the total of column (4) in the Stage II section is within one percent of the total in column (7) in the Stage I section. For example, if there are 312 persons in column 7, then since one percent of 312 is 3, column (4) should be between 309 and 315.

Verify that the total of column (6) in the Stage II section is within one percent of the total in column (8) in the Stage I section.

- b. If both of the conditions just described are satisfied, verify that the counts in columns (4) and (6) of the Stage II section have been posted correctly to Form F-203. Enter those counts on the ED labels. Then check lines 3 and 6 in column h of Part A of F-203 and return the EA to the QC Supervisory Clerk.

- c. If either (or both) of the conditions is not satisfied, check the posting to columns (3) to (6) on page 27. Then check the addition in columns (3) to (6). If column (4) is now within one percent of column (7), carry out step b above and make no further checks.

If not, turn to pages 1-24 of the Listing Book. Find units which have an entry in column 17 and no entry in column 18. Count the persons shown in column 12 for those units. On a piece of scratch paper, add the count of persons to the column (4) total. If the new count brings the column (4) figure within one percent of column (7), carry out step b above and make no further checks. Otherwise, follow the procedure described below.

Turn again to pages 1-24 of the Listing Book. Compare columns (17) and (18) for each Stage II unit. Where there is a difference, check the Stage II FOSSDIC book to find out why. Change column (18) as necessary. Add column (18) on each page and change the entries on page 27 and Form F-203 as required. Enter the correct population and housing counts on the ED labels. Then check lines 3 and 6 in column h of Part A of F-203 and return the EA to the QC Supervisory Clerk.

1.45 Turning in work to the Supervisory Clerk

When you turn books in to the QC Supervisory Clerk, separate books which have failed and books which have passed QC. Show the Supervisory Clerk the Form F-280 for the books which you are returning. Then return it to the appropriate bin and select an EA and F-280 from a different bin.

Appendix E.--QUALITY CONTROL SUPPLEMENT, DISTRICT OFFICE MANUAL,
TWO-STAGE AREAS (Extracts)

1.0 Introduction

- 1.1 General
- 1.2 Responsibilities

2.0 ED Check Activities Before Enumeration

- 2.1 Training Crew Leaders to Check ED's Before Enumeration
- 2.2 Practice Exercise
- 2.3 Observing Crew Leaders in the Field
- 2.4 Reviewing Crew Leader Reports on Map Review and Preparatory Work

3.0 Stage I Activities

- 3.1 Training Crew Leaders to do Enumeration and Field Review
- 3.2 Training Space
- 3.5 Observing Field Review
- 3.6 Reviewing Forms F-239, Daily Report of Field Review
- 3.7 Supervising the Office Quality Control Staff
- 3.8 Taking Corrective Action When Crew Leaders or Field Reviewers
Fail Office Quality Control or Transcription Verification
- 3.9 Filling Form F-285, District Office Quality Control Report

4.0 Stage II Activities

- 4.1 Recommending Crew Leaders for Stage II Work.
- 4.2 Training Crew Leaders and Field Reviewers to do Enumeration and
Field Review
- 4.3 Training Space
- 4.4 Observing Stage II Enumerator Training.
- 4.5 Observing Field Review
- 4.7 Supervising the Office Quality Control Staff.
- 4.8 Taking Corrective Action When Crew Leaders or Field Reviewers
Fail Office Quality Control
- 4.9 Filling Form F-285, District Office Quality Control Report

QUALITY CONTROL SUPPLEMENT, DISTRICT OFFICE MANUAL 125

District Office Manual

QUALITY CONTROL SUPPLEMENT

1.0 INTRODUCTION

1.1 GENERAL

The Quality Control Supplement of the District Office Manual describes the various Census activities that have to do with controlling the quality of the information collected by enumerators. The District Supervisor will be the person directly responsible for the quality of Census work in his office.

Reporting directly to the District Supervisor will be a Technical Officer who is primarily concerned with training and supervising the operations which affect the quality of the Census. The instructions in this Supplement are addressed to the Technical Officer who will be especially concerned with these operations. He is responsible to the District Supervisor for seeing that they are being performed correctly.

1.2 RESPONSIBILITIES

Your responsibilities as Technical Officer include:

- a. Training Crew Leaders to inspect their maps and to check ED's before the start of Stage I enumeration;
- b. Inspecting map review and ED check operations to see that Crew Leaders are doing the job correctly and are not falling behind in their work;
- c. Training Crew Leaders on enumeration and field review functions both for Stage I and Stage II;
- d. Checking that Crew Leaders and Field Reviewers are reviewing the work of their enumerators according to field review procedures;
- e. Training Office Quality Control Supervisory Clerks to inspect ED books as they are received from the field; and
- f. Supervising Office Quality Control Operations.

Although you will be given general supervision by the District Supervisor, you will be expected to carry out your duties with a minimum of guidance using the procedures in this manual. The District Supervisor will make a report on quality control activities to the Regional Office twice weekly. This report will be based on information you supply him. Your work will be reviewed by a Regional Program Technician who will visit you about once a week to review the quality control forms and to help you with any problems that you may have.

Section 5.0 of this Supplement contains a time table which shows how you will schedule your time between March 7 and the time the district office is closed.

2.0 ED CHECK ACTIVITIES BEFORE ENUMERATION

2.1 TRAINING CREW LEADERS TO CHECK ED'S BEFORE ENUMERATION

On March 14 (March 9 in rural areas) you will train Crew Leaders in the use of form F-236 (Exhibit 1) Crew Leader's Check List for Map Review and Preparatory Work. You will use form F-270, Technical Officer's Guide for Crew Leader Preparatory Training, Stage I, at this time. Review the sections of the Guide which you will use for training before you come to class. This Guide will contain the list of materials you will use for this training and which you must bring to the class with you. Detailed instructions to Crew Leaders are in Section 5.0 of form F-236, Crew Leader's Manual for Stage I. See Section 5.3 of the District Office Manual also.

2.2 PRACTICE EXERCISE

As part of their training, Crew Leaders will be given a practice assignment for which they will prepare an F-236. The Technical Officer should prepare these assignments during the week of March 7 as follows:

- a. Using the map for the Crew Leader in whose district the training is being conducted, prepare a different practice assignment area of one block for every two Crew Leaders in the class. Prepare a sketch map of each one block assignment. Allow one day for this work before the first day of Crew Leader Preparatory Training. In block cities, use the block numbers which actually appear on the Crew Leader's map so that the three blocks will represent an "Enumeration Assignment."

- b. Crew Leader trainees are to go through all of the steps shown on the F-236 Check List as if the practice assignment were an actual enumerator assignment.
- c. Collect all assignments at the end of the day and review them carefully to see whether the Crew Leader trainees understood this procedure. If the results of the practice exercise indicate that the trainee may not be suitable for a Crew Leader job, bring this to the attention of the District Supervisor immediately so that steps may be taken to replace him as soon as possible (see Section 2.32.)

2.3 OBSERVING CREW LEADERS IN THE FIELD

2.31 How to make appointments for observation.

Visit Crew Leaders while they are on the job to see that they are carrying out the procedures described in class. You may discover that Crew Leaders who have not called on you with a problem will have many questions when you arrive personally on the scene.

Before you finish training Crew Leaders, make appointments to visit them while they are checking ED's. Ask Crew Leaders to arrange their schedules so that they are doing map review and preparatory work rather than recruiting when you visit them. Start with Crew Leaders who you believe may need your help first, since you may not be able to visit all of them. Try to see as many Crew Leaders as possible each day, yet allow yourself enough time with each one to make the visit profitable. Check with the District Supervisor before you go out to see if there are any matters which he would like you to take up with the Crew Leader. Always coordinate your activities with the Supervisor and keep him informed of your location. Arrange to call him at specified times in case he has further instructions for you.

2.32 How to observe a Crew Leader checking ED's before enumeration.

Ask each Crew Leader to start ED check work on a new EA when you arrive, even though another may be in process. This will give you an opportunity to see the operation from start to finish and will make it easier for you to fill form F-288, Evaluation of Map Review and Preparatory Work (Exhibit 2). As the Crew Leader conducts his check using form F-236, Crew Leader's Check List, follow his progress and make sure that all steps are being followed and that the work is being done according to instructions. Refer to a blank F-236 as he makes the check. Take along a copy of the instructions in Section 5.0 of the Crew Leader's Manual for reference.

As each item on form F-236 is checked by the Crew Leader, evaluate his performance by checking one of the two columns in section A of F-288. If you check the second column, explain in section B what the Crew Leader failed to do or did incorrectly. When he finishes the EA, discuss all his errors with him.

In section C, record the action that you have taken as a result of your visit. If the Crew Leader made few errors, the appropriate action may be to compliment him! If he has made minor errors, retrain him on his weak points. If he has made major errors, but you believe he can be retrained effectively, you may want to make an appointment with him for an extended training session. However, if he has done such a poor job that you feel he should be released, make that recommendation to the District Supervisor without investing any further time in his retraining. The Crew Leader will be doing a poor job if he is not correcting maps when necessary; if he is failing to divide EA's which are clearly too large for one enumerator; if he is failing to list units in Items 4A and 4B of form F-236; etc.

2.33 How to file forms F-288.

Arrange all forms F-288 numerically by Crew Leader District in a folder in the District Office. Review them to see which Crew Leaders are not following instructions and may need additional visits. The Regional Program Technician will be examining the file of forms F-288 when he visits you.

2.4 REVIEWING CREW LEADER REPORTS ON MAP REVIEW AND PREPARATORY WORK

2.41 How to control forms F-236.

Make a simple check-in sheet like the following to use in controlling the receipt of F-236's:

Crew Leader District	Crew Leader	Date entered on duty	Number of EA's	Total Number of F-236's received to date				
				1	2	3	4	5 etc.
1	Johnson	3/14	14	✓	✓	✓	✓	
2	Williams	3/14	16	✓	✓			
3	Dayton	3/14	12	✓	✓	✓		
4	Owen	3/14	15					
5	Barton	3/17	17	✓				
etc.	etc.	etc.	etc.					

This will tell you quickly who is falling behind in his map review and preparatory work. Call each Crew Leader whose reports are not arriving at all or are arriving so slowly that you believe he will not finish the preparatory work in his area. Find out what his problems are and discuss with the District Supervisor what steps are necessary to expedite the preparatory work.

In some cases you may have to arrange assistance for Crew Leaders falling behind in F-236 work. This may include checking with the Crew Leader to find out why he is running behind schedule since he may either have misunderstood the job or is trying to do too detailed a job. For example, the Crew Leader may be attempting to make exact counts of dwelling units even though he was instructed to make rough counts.

Some of your Crew Leaders may be in areas where it is difficult to recruit enumerators. In such extreme cases, keep in mind that recruiting must take priority over T-night preparations and other preparatory work such as reviewing maps and checking ED's. Nevertheless, every effort must be made to complete preparatory work. Overtime should be authorized and additional assistance should be provided, if at all possible. If reserve Crew Leaders are available, they should be called upon to help complete this work.

2.42 How to review forms F-236.

As they are received in the District Office, examine each form F-236 in detail to determine whether it has been filled completely and correctly. Review each item in turn throughout the form to see that the Crew Leader took the appropriate action in each situation. Call him to discuss any errors and omissions he may have made.

There are two groups of Crew Leaders whom you should schedule for an early inspection: One consists of those who are filling forms F-236 incorrectly or incompletely and the other consists of those who never find anything unusual. By the latter, we mean Crew Leaders who never find T-night or M-night places, colleges or other special places, who never split ED's or report map changes. In many cases, such reports are correct, but for others such a report may mean that the Crew Leader has not been doing a thorough job.

If your review turns up anything that requires District Office action, either take the action yourself or notify the District Supervisor of the problem. For example, if a map is missing (Item 1), or there are problems in handling T-night places (Item 7), or difficulties in splitting ED's (Item 6), help the Crew Leader immediately with his problem.

If a Crew Leader reports a boundary change which may affect an adjoining Crew Leader District, have both Crew Leaders involved correct their maps accordingly. This is important since otherwise, some area may not be canvassed and others may be canvassed twice. See Section 7.0 of the District Office Manual, F-250, for reporting boundary changes.

2.43 Items 6 and 7 of F-236.

There are two situations which must be brought to the attention of the District Supervisor:

- a. Item 6 shows the EA has been divided,
- b. Item 7 (column 7) shows that a separate ED has been established.

In such cases, see that the District Supervisor receives the form F-236, Crew Leader Check List, so that necessary changes may be made on the office copy of:

- a. Form F-237, Crew Leader Record of Assignment (Exhibit 3)
- b. Form 60-11-281, Advance Transmittal Listing
- c. Form F-322
- d. District Office Maps, etc.

See Section 7.0 of the District Office Manual, F-250.

2.44 How to file forms F-236.

Prepare a separate folder for each Crew Leader District in which to file the F-236's that have been checked in and reviewed. Arrange the folders numerically by Crew Leader District. The Regional Program Technician will want to inspect this file when he visits your office.

The F-236's will be needed by Crew Leaders during enumeration, of course, and must be returned to them early enough so they can use them to prepare enumerator assignments before the first enumerator training class.

3.0 STAGE I ACTIVITIES

3.1 TRAINING CREW LEADERS TO DO ENUMERATION AND FIELD REVIEW

You will use form F-271, Technical Officers Guide For Training Crew Leaders, for instructing Crew Leaders on Stage I enumeration activities. Those activities include supervising Enumerators and Field Reviewers, and conducting field reviews. The Guide, which you should read carefully ahead of time, will tell you the training materials and equipment you must bring to the class for training Crew Leaders.

3.2 TRAINING SPACE

Section 5.6 of the District Office Manual, F-250, contains detailed instructions on training space and facilities needed.

3.5 OBSERVING FIELD REVIEW

3.51 How to make appointments.

One of your most important functions as Technical Officer will be to see that field review, the basic quality control operation, is carried out correctly by Crew Leaders and Field Reviewers. This will be done by visiting Crew Leaders and Field Reviewers on the job to watch the conduct of field review and to retrain as necessary. Start with Crew Leaders whom you did not observe filling out forms F-236.

Plan to visit two Crew Leader districts a day on April 2, 4, and 5 to see both the Crew Leader and Field Reviewer. After April 5, you will be spending most of your time in the District Office.

Call Crew Leaders and Field Reviewers a day ahead to make arrangements, and to make sure they will be doing field review before you schedule a visit. Start with the Crew Leaders and Field Reviewers who appear to need the most help. When you meet with them, examine any F-243 forms which they have filled out up to this time to see whether they are doing the job correctly.

3.52 How to observe field review and fill form F-282.

Complete the heading items of form F-289, Evaluation of Field Review for PH-1 or PH-2 (Exhibit 4) for each Crew Leader or Field Reviewer before he starts his field review. As he conducts the review using form F-243, Record of Field Review, follow his progress and make sure that all steps are being followed and that the work is being done according to instructions. It will be useful to have in front of you a blank F-243, and a copy of field review instructions in the Crew Leader's Manual.

As the Crew Leader completes each section of F-243, evaluate his performance by

QUALITY CONTROL SUPPLEMENT, DISTRICT OFFICE MANUAL 127

checking one of the three columns in section A of form F-239. If you check the second column, explain in section C what the Crew Leader or Field Reviewer failed to do or did incorrectly. When he has finished the review, answer the questions in section B of F-239 by checking one of the two columns. If you check the second column, explain in section C what the deficiencies were.

After the enumerator leaves, discuss the results of your observations with the Crew Leader or Field Reviewer. Tell him what he failed to do and what he did incorrectly. Explain how the review should have been conducted in the places where he went astray.

In Section D, record the action that you have taken as a result of your visit. If the Crew Leader or Field Reviewer has done a good job, tell him so. If he has made minor errors, you would want to train him on his weak points on the spot. If he has made major errors, but you believe he can be retrained effectively, you might want to make an appointment with him for an extended training session. However, if he has done such a poor job that you feel he should be released, make that recommendation to the District Supervisor without investing any further time in his retraining.

3.53 How to file forms F-239.

File all forms F-239 numerically by Crew Leader district or Field Reviewer in a folder in the District Office. Review them to see which Crew Leaders or Field Reviewers may need additional visits. The Regional Program Technician will be examining the file of forms F-239 when he visits the office.

3.6 REVIEWING FORMS F-239, DAILY REPORT OF FIELD REVIEW

3.61 How to check in forms F-239 (Exhibit 5).

Make a simple check-in sheet like the following to use in controlling the receipt of F-239's:

Crew Leader District	Name of Crew Leader or Field Reviewer	Date shown on F-239					
		April 2	3	4	5	6	etc.
1	Johnson (CL)	✓		✓	✓	✓	
1	Klein (FR)	✓		✓	✓	✓	
2	Williams (CL)	✓		✓	✓	✓	
2	Weber (FR)	✓		✓	✓	✓	
3	Dayton (CL)	✓		✓	✓	✓	
3	Kotns (FR)	✓		✓	✓	✓	
4	Owen (CL)	✓		✓	✓	✓	
4	Robin (FR)	✓		✓	✓	✓	
etc.	etc.			etc.			

This will tell you quickly who is not sending in an F-239 each day. Each Crew Leader and Field Reviewer is to submit a report daily, starting April 2nd, until Stage I is completed. Of course, Field Reviewers will not be working on field review throughout the entire period. We plan to have them do field review on April 2, 4, and 5 and return to field review later when final review activities are at peak. In the meantime, Field Reviewers are to be assigned to do enumeration work in EA's where enumerators drop out or where close-out work is required.

Although you will not always know when an F-239 is due from a Field Reviewer, you will know that a Crew Leader is to send you one each day, except Sunday, and that you can call Crew Leaders whose F-239's are not arriving to find out why.

Since Field Reviewers are authorized to work for 56 hours, exclusive of enumerator and Field Reviewer training, during Stage I, review F-239's to see whether any Field

Reviewers are exceeding the authorization. However, you will authorize more time for a Field Reviewer if his Crew Leader is relieved of his field review duties. (See sections 3.81 and 4.8 of this Supplement.)

3.62 How to review forms F-239.

Look for two things on each form F-239 which arrives:

- (1) Is the field review action consistent with the number of errors shown in columns (b) through (g)? If the wrong action was taken, call the Crew Leader to correct him.
- (2) Are Crew Leaders and Field Reviewers doing enough field review? On April 2, the Field Reviewer should make six reviews and the Crew Leader should make four. After that, they should each conduct six reviews per day. If the number conducted is substantially below six, call to find out why. Perhaps the Crew Leader is wasting his own time or that of his Field Reviewer with matters less important than field review. If so, insist on his giving field review first priority. After the first three days, the number of field reviews required daily should decrease until enumerators finish their assignments and final review begins.

3.63 How to file forms F-239.

Prepare a folder for each Crew Leader district in which to file the F-239's that have been checked in and reviewed, after you prepare a form F-285, District Office Quality Control Report. The instructions for preparing F-285 are in Section 3.9 of this Supplement.

When you file the F-239's, arrange the folders by Crew Leader District. Include F-239's for the Field Reviewer as well as for the Crew Leader. The Regional Program Technician will want to inspect this file each time he visits your office.

3.7 SUPERVISING THE OFFICE QUALITY CONTROL STAFF

3.71 How to recruit clerical supervisors and clerks.

You will be responsible for recommending supervisors and clerks to be assigned to the two Stage I office operations which are concerned with quality: Stage I QC and Transcription Verification. A complete description of these operations is contained in the Office Procedures Manual, F-250A.

The supervisors and clerks are to be selected from enumerators who finish early and are recommended by their Crew Leader. Select persons who live in or within commuting distance of the District Office city. The Quality Control Supervisors will be needed fairly early in the operation at about the time the first complete ED Books begin to arrive from the field.

Recruit by calling Crew Leaders in the District Office city as the first ED Books arrive and asking for their recommendations about enumerators in their districts who have finished. When the District Supervisor has approved your selection, either call these enumerators directly or ask the Crew Leader to inquire for you and call you back. If you cannot get enough qualified persons in this way, turn to the Crew Leaders just outside the District Office city.

3.72 How to supervise the operations.

Although each of the operations will have a clerical supervisor, you will have overall responsibility for the conduct of the office work. However, you will be away from the office frequently, conducting training, observing field review, and following up Crew Leaders who have had ED's rejected in the office. Consequently, you will have to rely on the Administrative Clerk to look after these operations during your absence. The Administrative Clerk should be trained, therefore, on both quality control and transcription verification at the same time that you train the Supervisory Clerks of these operations.

Train each QC Supervisor thoroughly in all aspects of his job, using the Office Procedures Supplement as a guide. Four hours have been allowed for training each supervisor. When you train on the clerical work, use a completed

QUALITY CONTROL OF THE FIELD ENUMERATION

ED Book as an illustration and actually conduct the required operations for it.

You will have to check with each supervisor frequently to satisfy yourself that the procedures in the manual are being followed. Rather than wait for a supervisor to come to you with problems, visit each of the supervisors frequently to see for yourself whether things are going well or not. Pay particular attention to the way supervisors train their clerks.

In the Stage I QC section, examine the forms completed by Quality Control Clerks to see that they are correct. In the Transcription Verification section, review the verification forms to see that the sampling and the verification have been done according to instructions.

Note the speed with which these operations are conducted. If a bottleneck does develop, arrange for more clerical help after first making sure that there has not been a delay because clerks are checking more than we have asked them to.

On April 12, review forms F-278 to see whether the number of EA's which passed Transcription Verification is about the same for each Crew Leader. If you find that very few EA's have been verified for certain Crew Leader districts, give priority to these books in both operations. The purpose of this is to insure that each Stage II Crew Leader will have enough EA's to give to his enumerators and that EA's will be equally distributed throughout his district.

3.73 What to do about damaged books.

The QC Supervisory Clerk may occasionally show you damaged books which are torn or wrinkled, have heavy creases, or have marks in the margin on a number of pages. You will have to decide whether these books are to be copied over completely or left as they are. The ROSDIC machine will not be able to "read" pages which are too badly damaged. On the other hand, copying ED Books over is a time-consuming and expensive process.

It is difficult to give precise rules for making this decision. If the sheets are merely dog-eared or slightly torn, or the marks in the margin can be easily erased, do not have the ED Book copied over. However, if a book is damaged extensively, it will be easier to have it copied over. In such cases, be sure to have the work verified by proof reading.

3.8 TAKING CORRECTIVE ACTION WHEN CREW LEADERS OR FIELD REVIEWERS FAIL OFFICE QUALITY CONTROL OR TRANSCRIPTION VERIFICATION

3.81 Office QC.

The Stage I QC Supervisory Clerk will inform you when an ED fails office QC. Examine the ED to see if it is a separate ED, which required special enumeration procedures, such as a hotel, motel, YMA, for transient guests. If so, the ED will be considered not to have been rejected at all, and you will cross out the R in the last column of form F-267 or F-268 and enter a T. (See exhibits in F-250A) If the ED is not a transient establishment, treat it as a rejected ED, and follow the procedure described below.

Examine the form F-267 or F-268 to determine which items contributed most to rejection. This information will be used when you discuss the failure with the Crew Leader in whose district it occurred. Also note whether the F-267 or F-268 was for the Crew Leader or his Field Reviewer.

The first time that an ED given final review by the Field Reviewer is rejected in the office, telephone his Crew Leader immediately. Point out what kinds of errors were made and instruct the Crew Leader to visit his Field Reviewer either to retrain or release him. The second time a Field Reviewer has a rejected ED, he is to be relieved of his field review functions immediately, even though he may not have had a chance to be retrained between the time the first ED and the second ED failed. He may be assigned to do enumeration, however, if any work is available.

The first time a Crew Leader has a rejected ED, you are to make an appointment with him immediately to observe him conducting a final field review. Watch him carefully as he conducts final review and fill a form F-289 for him. Pay particular attention to the way he handles errors and omissions. Note especially how he handles the problems which caused the ED to be rejected. If there are no

errors or omissions (or very few) in the EA he reviews, watch him review another. Point out the kinds of errors found in office QC. Decide whether to retrain him or to recommend to the District Supervisor that his field review work be transferred to the Field Reviewer.

The second time a Crew Leader has a rejected ED, check the date of final review in the Listing Book to see whether the review took place after you observed him earlier. If so, he is to be relieved of his field review duties, and his Field Reviewer is to conduct all further final reviews. The Crew Leader will continue as usual in all other activities. If the review took place before you observed and retrained him, take no action.

If the Crew Leader has been relieved of field review and his Field Reviewer has also been released because of two rejections, assign the remaining work to a Field Reviewer, Reserve Crew Leader, or regular Crew Leader in a neighboring district who has finished his work and will not be working on Stage II.

3.82 Transcription verification.

The Transcription Verification Supervisor will inform you whenever an ED fails transcription verification. ED's which fail will not be returned to the field, but will be corrected in the office. The Transcription Verification Supervisor may ask your advice about whether to try to patch up a rejected ED or whether to do it over completely. Some general guidelines for making this decision appear in the Transcription Verification section of the Office Procedures Supplement.

Even though rejected ED's will be corrected in the office, we still want to take action on Crew Leaders who are letting poor transcription get by. Telephone the Crew Leader to tell him which ED failed and why. Check the F-279 Book before you call so that you will know whether it was the Crew Leader himself or his Field Reviewer who did final review and presumably did a poor job on verification of transcription.

If it was the Field Reviewer, ask the Crew Leader to retrain him as required. If it was the Crew Leader, retrain him as best as you can over the

phone. Point out the kinds of errors that were found by the Transcription Verifier. If ED's from a particular district are failing repeatedly, then a personal visit from you is essential during which you would either retrain the Crew Leader or recommend his release to the District Supervisor.

3.9 PREPARING F-285, DISTRICT OFFICE QUALITY CONTROL REPORT

Form F-285, (Exhibit 6) summarizes for the Regional Office and Washington the entire quality control picture in your office from Field Review, Clone-out and Transcription Verification through Office Quality Control and office Transcription Verification. It is to be completed in duplicate. Prepare this report for the District Supervisor so that he may mail the original copy each Monday and Thursday to the Regional Office. The easiest way is to remain in the office. The District Supervisor will report the totals of columns (b-p) to the Regional Office by telephone when the progress report information is phoned each Monday and Thursday.

The first mailing date for Stage I is Monday, April 4th. Thereafter, one form for Stage I should be prepared each Thursday and Monday until the last Stage I ED has gone through office transcription verification and has been reported on F-285. Write "Final Stage I Report" at the top of the F-285 when you prepare the last Stage I report. (When Stage II begins, the District Supervisor will also have to send in a report for Stage II activities each Monday and Thursday.) During the period when Stage II is underway but Stage I is not yet completed, he will be sending two forms F-285 on each report date.

If you have clerical assistance in preparing form F-285, you must verify that the work has been done correctly. You should allow between two and three hours to prepare this report for about 25 Crew Leader districts.

Form F-285 is always to be a cumulative report. That is, it includes not only everything that has happened since the previous report but everything before that as well. Thus, each entry will be the total number to date.

Detailed instructions for completing form F-285 appear below:

Heading Items. Be sure to fill all heading items correctly. With reports from many offices reaching the Regional Office twice weekly, it will be most important to have complete identification.

Column g. Write in the name of each Crew Leader. Use additional pages as required.

Columns b-k. The entries for columns b-k come directly from the field review action section of forms F-239, Daily Report of Field Review. For the first F-285 report you complete, simply add the "field review action" totals for all F-239's received to date from a Crew Leader district and post those totals in columns b-k of F-285. Be sure to include the F-239's from Field Reviewers as well as those from Crew Leaders.

Remember that the entries on the F-285 are to be cumulative; that is, they represent all work done to date. This means that in preparing subsequent F-285's you will have to add totals on F-239's received since the previous report to the totals shown on the previous F-285. File F-239's as soon as the F-285 has been prepared. Then leave incoming F-239's unfilled until they have been included in the next F-285, after which you should file them immediately. An easy method of preparing an F-285 report would be to put the new totals in lightly above the corresponding totals on the previous report. Then add to get the new cumulative totals and post the new totals to a new copy of the form F-285.

Columns l-n. The entries in columns l and m will come from the forms F-267 and F-268 that are maintained in the Stage I office QC section. Ask the QC Supervisory Clerk to give you a count each Monday and Thursday of the number of ED's inspected and the number rejected for each Crew Leader district. This count must include ED's received from Field Reviewers as well as Crew Leaders. This count can be made more easily by examining each F-267 and F-268 than by trying to keep track of the changes that have occurred since the last F-285 was prepared.

The entry in column n will come from your personal knowledge of the number of Crew Leaders who have been relieved of field review duties.

Columns o and p. The entries in columns o and p will come from the forms F-278 that are maintained in the office transcription verification section. Ask the Transcription Supervisor to give you a count each Monday and Thursday of the number of ED's inspected and the number rejected. Again, this count should be made by examining all F-278's rather than by trying to keep track of changes that have occurred since the last F-285 was prepared.

Total Lines. If you need only one F-285 page, enter the totals on the bottom line. If you have more than one F-285 page, enter page totals on the line next to the bottom and the total for all pages on the bottom line of the first page.

The information on the F-285 will be useful to the District Office as well as to the Regional Office. You will be familiar with field review and the office operations from personal contact, of course, but it will be advantageous for the District Supervisor to have an overall picture of quality in each Crew Leader's district so he can see where the trouble spots are.

4.0 STAGE II ACTIVITIES

4.1 RECOMMENDING CREW LEADERS FOR STAGE II WORK

The District Supervisor will rely on your recommendations for selecting Crew Leaders for Stage II. Be prepared to advise him about Crew Leaders, using the most recent F-285, the forms F-236, F-286, and F-289, and any additional personal knowledge you may have. A complete list of the attributes which Stage II Crew Leaders should have is given in Section 2.56 of the District Office Manual. In some instances you may want to recommend persons who were Field Reviewers in Stage I to be Stage II Crew Leaders.

4.2 TRAINING CREW LEADERS AND FIELD REVIEWERS TO DO STAGE II ENUMERATION AND FIELD REVIEW

You will use form F-271A, Technical Officer's Guide for Training Crew Leaders in Technical Functions, Stage II, to train Crew Leaders to conduct Stage II enumeration. The Guide will also tell you which training materials and equipment you must bring to the class when you train.

Field Reviewers will be selected by Crew Leaders from the enumerators recommended for Stage II

on form F-238 or from Field Reviewers who proved to be satisfactory in Stage I. They will be trained on Stage II activities along with Crew Leaders if there are 12 or fewer Crew Leaders in the District Office. Otherwise, they will be trained with enumerators and given on-the-job field review training by their Crew Leaders as in Stage I.

4.3 TRAINING SPACE

Section 5.6 of the District Office Manual, F-250, contains detailed instructions on training facilities.

4.4 OBSERVING STAGE II ENUMERATOR TRAINING

Plan to visit as many locations where Crew Leaders are training their enumerators as possible. Select Crew Leaders who may need your help. Pay particular attention to the session during which household questionnaires are transcribed to FOSDIC Books.

4.5 OBSERVING FIELD REVIEW

4.51 How to make appointments.

One of your most important functions as Technical Officer in Stage II will be to see that field review, the basic quality control operation, is carried out correctly by Crew Leaders and Field Reviewers. This will be done by visiting Crew Leaders and Field Reviewers on the job to watch the conduct of field review and to retrain as necessary.

Plan to visit two Crew Leader districts a day, starting April 22, to see both the Crew Leader and Field Reviewer. Starting around April 26, Field Reviewers will be assigned to other duties and Crew Leaders will be doing field review alone, so you may be able to visit three or more Crew Leader districts on those days. However, as soon as Stage II ED Books start arriving at the office, you will have to spend most of your time supervising office QC operations.

Call Crew Leaders and Field Reviewers a day ahead to make arrangements, and to make sure they will be doing field review before you schedule a visit. Start with the Crew Leaders and Field Reviewers who appear to need the most help.

4.52 How to observe field review and fill form F-289A.

Complete the heading items of form F-289A, Evaluation of Field Review for PH-3 or PH-4, for each Crew Leader or Field

4.53 How to file forms F-289A.

File all forms F-289A by Crew Leader or Field Reviewer in a folder in the District Office. Review them to see which Crew Leaders or Field Reviewers may need additional visits. The Regional Program Technician will be examining the file of forms F-289A when he visits the office.

4.7 SUPERVISING THE OFFICE QUALITY CONTROL STAFF

4.71 How to select the clerical supervisor and clerks.

You will be responsible for recommending supervisors and clerks for the Stage II office QC operation.

A complete description of this operation is contained in the Office Procedures Supplement, F-250A.

The supervisor and clerks should be the same persons who were used in the office in Stage I, providing they were satisfactory. Otherwise, they should be selected from other persons who worked in Stage I and were not used in the field in Stage II. As in Stage I, the QC Supervisory Clerk will be needed at about the time the first ED Books begin to arrive from the field.

4.72 How to supervise the operation.

Although the operation will have a clerical supervisor, you will have overall responsibility for the conduct of the work there. However, you will be away from the office frequently, observing field review, and following up Crew Leaders who have had ED's rejected in the office. Consequently, you will have to rely on the Administrative

QUALITY CONTROL OF THE FIELD ENUMERATION

Clerk to look after the operation during your absence.

Train the supervisor thoroughly in all aspects of his job, using the Office Procedures Manual as a guide. Four hours have been allowed for this training. When you train on the clerical work, use a completed ED Book as an illustration and actually conduct the required operations for it.

You will have to check with the supervisor frequently to satisfy yourself that the procedures in the manual are being followed. Rather than wait for him to come to you with problems, visit him frequently to see for yourself whether things are doing well or not. Pay particular attention to the way he trains his clerks.

While in the Stage II QC Section, examine the form F-280 completed by clerks to see that they are correct. Note the speed with which the operation is conducted. If a bottleneck does develop, arrange for more clerical help, after first making sure that there has not been delay because clerks are checking more than we have asked them to.

4.73 What to do about damaged books.

Handle these as you did in Stage I.

4.8 TAKING CORRECTIVE ACTION WHEN CREW LEADERS OR FIELD REVIEWERS FAIL OFFICE QUALITY CONTROL

The Stage II QC Supervisory Clerk will inform you when an ED fails office QC. Examine the form F-280 to determine which items contributed most to rejection. This information will be used when you discuss the failure with the Crew Leader in whose district it occurred. Also note whether the F-280 was for the Crew Leader or his Field Reviewer. Do not return M-night ED's.

The first time that an ED given final review by the Field Reviewer is rejected in the office, telephone his Crew Leader immediately. Point out what kinds of errors were made and instruct the Crew Leader to visit the Field Reviewer either to retrain or release him. The second time a Field Reviewer has a rejected ED, he is to be relieved of his field review functions even though he may not have had a chance to be retrained between the time the first ED and the second ED failed. He may be assigned to do enumeration, however, if any work is available.

The first time a Crew Leader has a rejected ED, you are to make an appointment with him immediately to observe him conducting a final field review. Watch him carefully as he conducts final review, and fill a form F-289A for him. Pay particular attention to the way

he handles errors and omissions. If there are no errors (or very few) in the ED he reviews, watch him review another. Point out the kinds of errors found in office QC. Decide whether to retrain him or to recommend to the District Supervisor that his field review work be transferred to his Field Reviewer.

The second time a Crew Leader has a rejected ED, check the date of final review in the Listing Book to see whether the review took place after you observed him earlier. If so, he is to be relieved of his field review duties, and his Field Reviewer is to conduct all further final reviews. The Crew Leader will continue as usual in all other activities. If the review took place before you observed and retrained him, take no action.

If the Crew Leader has been relieved of field review and his Field Reviewer has also been released because of two rejections, assign the remaining work to a reserve Crew Leader or Field Reviewer in a neighboring district who has finished his work.

4.9 PREPARING F-285, DISTRICT OFFICE QUALITY CONTROL REPORT

Form F-285 summarizes for the Regional Office and Washington the entire quality control picture in your office from field review, through office quality control. It is to be completed in duplicate. Prepare this report for the District Supervisor so that he may mail the original copy each Monday and Thursday to the Regional Office. The second copy is to remain in the District Office. The District Supervisor will report the totals of column b-n to the Regional Office by telephone when the progress report information is phoned each Monday and Thursday.

The first mailing date for Stage II is Monday, April 25. Thereafter, one form for Stage II should be prepared each Thursday and Monday until the last Stage II ED has gone through office quality control and has been reported on F-285. Write "Final Stage II Report" at the top of the F-285 when you prepare the last Stage II report. (During the period when Stage II is underway but Stage I is not yet completed, the District Supervisor will be sending two forms F-285 on each report date.) If you have clerical help in preparing form F-285, you must verify that this work has been done correctly.

Form F-285 is always to be a cumulative report. That is, it includes not only everything that has happened since the previous report but everything before that as well. Thus, each entry will be the total number to date.

Detailed instructions for completing form F-285 are the same as in Section 3.9 except that columns o and p will not be used in Stage II.