**STEPS AND RULES FOR MATCHING**

**STEP 1**

**Matching households through head of household**

1. Relationship to the head = 1

1. Name + surname + age + sex + marital status (if all are the same for census and PES it implies a **perfect match**)

**Perfect match** – can also delete surname but still have perfect match

1. Relationship to the head = 1

2. Name + Age + Sex + Marital status – still have perfect match

Age + or -1

**Possible match**

3. Name + Age + Sex

4. Name + Age + Marital status

5. Age + Marital status + Sex

**STEP 2**

**Matching individuals**

1. Name + surname + age + sex + marital status (if all are the same for census and PES it implies a **perfect match**)

**Perfect match** – can also delete surname but still have perfect match

1. Relationship to the head = 1

2. Name + Age + Sex + Marital status – still have perfect match

Age + or -1

**Possible match**

3. Name + Age + Sex

4. Name + Age + Marital status

5. Age + Marital status + Sex

**Flexible Match (Relax)**

6. Name + Surname + Sex + Age

(Age given in range i.e less than 10 +1or-1, less than 20 +or-2, less than 30 +3or-3)

**Rules for matching households**

* Matched Household – record code for individual households in PES and Census
* Matching status 1. Matched perfect

2. Possible

3. Flexible/ relaxed

* **EXAMPLE**

**PES Census**

1. Thabo Rakhetsi 1. Thabo Nketsi
2. Reitumetse Nketsi 2. Reitumetse Nketsi
3. Mike Nkotsi 3. Mike Nkotsi
4. Tom Thabana 4. Tom Thabane
5. Wallet Nketsi 5. Wallet Nketsi

Juda Takz

1 , 2 , 3 and 5 are Non Movers

4 a non mover

Juda in reconciliation because he might be missed in the PES

**STEP 3**

For Non-Matchers in the PES

Check the neighbouring households, then the neighbouring EAs or adjust to the EA in questions from the census frame or dataset. If household found in another neighbouring, we remove it from PES and assign a code match. If the household is still not found, then we will need to go for reconciliation visits with respect to the households.

Enumerated in the census and not in the PES, go to the field to check or it might be erroneous inclusion.

**3 types of codes**

1. Matching status – perfect, possible or relax match
2. Enumeration status – including the information about in movers and non-movers
3. Code for matched person

* Have 5 rules for household matching and have 10 rules for individual matching.