



PISA 2018 MATERIALS PREPARATION: FIELD TRIAL – COGNITIVE PART

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Produced by cApStAn and Béatrice Halleux under the
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PEARSON



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INTRODUCTION

1. This document sets out instructions for NPMs and National Centre staff responsible for national translations and adaptations of the PISA 2018 Field Trial version of paper-based and computer-based Cognitive tests. Instructions for the preparation of questionnaires are set out in a separate document ¹.
2. Please refer to Chapter 5 of the *NPM manual* for a full description of the PISA standards, the testing languages, the Translation Plan and the recruitment of translators; and to the *PISA 2018 Translation and Adaptation Guidelines* for detailed explanations on the double translation and reconciliation procedure.
3. The table below shows the key documents that are essential for the translation, adaptation and preparation of the PISA 2018 cognitive tests.

Table 1. Key documents

Document name	Document content	Document location
<CY7_1603_PISA2018_TranslationAdaptationGuidelines.docx>	PISA 2018 Translation and Adaptation Guidelines	PISA Portal > Documents > Materials > Field Trial Resources > Translation > Translation Kit
<CY7_1603_PISA2018_Materials_Preparation_FT_Cognitive_part>	<i>This Materials Preparation document</i>	PISA Portal > Documents > Materials > Field Trial Resources > Translation > Translation Kit
<CY7_1603_NPM_Manual_Chapter5.docx>	PISA 2018 NPM Manual Chapter 5	PISA Portal > Documents > Materials > Field Trial Resources > Translation > Translation Kit
<CY7_1603_TST_FTMaterialsPreparationCognitive_1.docx>	PISA 2018 Translator's Guide	Video Tutorial as well as latest version of the written guide available in: http://wiki.capstan.be/manuals/doku.php?id=pisa:transolt PDF version (latest version can be downloaded from the above link in PDF format at all times): PISA Portal > Documents > Materials > Field Trial Resources > Translation > Translation Kit
<CY7_1603_TST_FTMaterialsPreparationCognitive_1.docx>	PISA 2018 Reconciler's and National Reviewer's Guide	Video Tutorial as well as latest version of the written guide available in:

¹ CY7_QST_PISA2018_Materials_Preparation_FT_QQ_part.docx

<http://wiki.capstan.be/manuals/doku.php?id=pisa:start>

PDF version (latest version can be downloaded from the above link in PDF format at all times):

PISA Portal > Documents > Materials > Field Trial Resources > Translation > Translation Kit

<CY7_GEN_CBA_PISA2018_Recurring_Directions_Prompts>	List of all recurring directions and prompts, in ENG and FRA, for PISA2015 item types.	
<CY7_1603_Checklist_for_reviewing_Transferred_Trend_units_in_CBA>	Checklist for Countries' Review of Trend Units transferred to CBA format by Core A	
<CY7_1603_Cognitive_Units_PISA_2018_Field_Trial>	List of Cognitive Units administered in the PISA 2018 Field Trial with relevant word counts	

Internationally equivalent PISA materials

- The equivalence of test materials with the international source versions and the policy of using unchanged trend items are the subject of PISA Standards 4.1, 4.2 and 5.1 displayed in the NPM manual.

Documentation on languages to be used

- The languages of testing are defined as described in the Technical Standard 2.
- The NPM should develop as many versions of the test instruments as there are languages of instruction used in the schools included in the national sample. The test languages identification was part of the Sampling Task 0 (ST0), which should be completed by the time the present document is circulated.

COUNTRIES ADMINISTERING COMPUTER-BASED TEST

This section concerns only those countries that administer the test in computer based mode. Countries administering the paper-based test should refer to section “Countries administering paper-based test” that can be found after this section within this same document.

CHAPTER 1 - VOLUME, FORMAT AND DISPATCH SCHEDULE

Amount of material to translate/adapt/review and dispatch schedule

7. The updated translation kit contains a document listing all units to be translated and their word count in the English source version (see CY7_1603_Cognitive_Units_PISA_2018_Field Trial). Note that most of the units listed in this document will have gone through extensive review after the feedback from country reviews and the Translatability Assessment. Draft units that were circulated for review should not be considered as being ready for translation. However, trend materials, and new materials that will be made available on the PISA Portal will be reliable and should be used as a basis for translation/adaptation.
8. The expected dispatch schedule and volumes are the following:

New Reading Literacy

- English and French source versions of 31 new Reading units with approximately 41,000 words will be released on **1 April 2016** in multiple batches. These units will be tentatively divided into 6 roughly equal batches (based on word counts). This release will also include draft coding guides in English to be used for reference while translating the items.
- English and French source versions of the new Reading coding guides will be tentatively released in mid-May to be used for translation (noting that the final coding guides will only be available in early Feb-2017 after the coding training).

Global Competence

- English and French source versions of 13 new Global Competence units with approximately 15,000 words will be released in 2 sets:
 - The first set of material will be tentatively released on **1 April 2016** and will contain 4 units with approximately 5,500 words.
 - The second set of material will be tentatively released on **29 April 2016** and will be divided into 2 roughly equal batches (based on word counts). This set will contain 9 units with approximately 9,500 words.
- Coding guides are not applicable to Global Competence as these units are all automatically scored

New Financial Literacy (if your country is participating in this international option)

- English source versions of 5 units with approximately 2,500 words will be tentatively released on **1 April** as a single batch. This release will also include draft coding guides in English to be used for reference while translating the items.
- English source versions of the Financial Literacy coding guide will be tentatively released in mid-May to be used for translation (noting that the final coding guides will only be available in early Feb-2017 after the coding training).

Orientation and Help

- English and French source versions of these materials with approximately 5,500 words will be tentatively released on **29 April** as a single batch.
- Some of this material will be new, however, as much of the material from the orientation and help will be reused from the 2015 cycle as possible.

Trend Math units (only countries that have not yet administered these units in previous cycles)

- English and French source versions of 40 units with approximately 6,500 words will be tentatively released on **1 April** as a single batch. This release will also include draft coding guides in English to be used for reference while translating the items.

Trend Reading units (only countries that have not yet administered these units in previous cycles)

- English and French source versions of 25 units with approximately 16,000 words will be released on **1 April** as a single batch. This release will also include coding guides in English to be used for reference while translating the items.

Trend Science units (only countries that have not yet administered these units in previous cycles)

- English and French source versions of 13 'old' trend science units with approximately 5,755 words will be tentatively released on **1 April** as a single batch. This release will also include coding guides in English to be used for reference while translating the items.
- English and French source versions of 24 'new' trend science units (i.e. units that were new in PISA 2015) with approximately 15,000 words will be tentatively released on **1 April** as a single batch. This release will also include coding guides in English to be used for reference while translating the items.

Trend Financial Literacy units

- English source versions of 33 units with approximately 5,500 words will be tentatively released on **1 April** as a single batch. This release will also include coding guides in English to be used for reference while translating the items
9. The dispatches of new Reading Literacy, Global Competence and Financial Literacy Option materials, which exist in CB mode only, will consist of:
- XLIFF files (one file per unit).
 - Test Adaptation Spreadsheets (TAS) in Excel format containing item-per-item guidelines. New Reading and Global Competence units will be released in batches as they are ready for national translation work, with one TAS for each batch of released materials. (As mentioned earlier, countries are invited to use the recurring directions document for those directions and prompts that are used consistently throughout the Reading and Global Competence units.)
 - Links to the PISA Portal to allow previews of the English source, the French source (except for Financial Literacy units) and the national version.
10. The dispatch of General and domain-specific orientations, error messages, rollover text (button labels, etc.) and “Help” content will include:
- The general orientation will introduce the screen design (location and meaning of the progress bar, unit and item identification, etc.), and general navigation (clicking on Next and Back).
 - Domain-specific orientations will include information about domain-specific functionalities (e.g., the equation editor for math, paging and scrolling interfaces for reading, simulations for science, etc.)
11. Table 2 shows the key dates for translation, adaptation and verification at Field Trial stage.

Table 2. Key dates in the Translation, Adaptation and Verification Timeline

Domain	Action	Who?	Date
New Reading items	Beginning of translation/adaptation	All CBA countries	April 1, 2016
Global Competence, batch 1	Beginning of translation and adaptation	All CBA countries	April 1, 2016
Financial Literacy (CB) trend and new)	Dispatch ENG source	CBA Countries participating in FNL International Option	April 1, 2016
Global Competence, batch 2, and Orientation and Help	Beginning of translation and adaptation	All CBA countries	April 29, 2016

Trend Materials listed above	Beginning of translation/adaptation of trend materials	CBA and PBA Countries that did not participate in PISA 2015	April 1, 2016
		Countries switching from PBA to CBA	
All new materials	End of translation/adaptation window	Countries	As per country-specific PVS
	End of verification window for new materials	cApStAn	As per country-specific PVS
All domains	Locking of Final National versions in Authoring Platform		As per country-specific PVS
Trend coding guides	Translation, adaptation	Countries that did not participate in PISA 2015	Can start once cognitive units have been translated
	Verification	cApStAn	February 2017 onwards
New Reading coding guide (and new FinLit coding guide)	Translation, adaptation	All CBA countries	From Mid-May 2016 OR after Coder training
	Verification	cApStAn	February 2017 onwards

CHAPTER 2 – GETTING STARTED

12. This section is about materials that need to be translated i.e. that your country has not administered in previous cycles. The Translation Kit for trainers of translators and reconcilers will be made available after the NPM Meeting in Prague so that countries can begin the translation adaptation of new materials as soon as these are dispatched. The Translation Kit contains all files, instructions and examples needed to get started.
13. New countries may want to begin by translating trend material – which is new material to them. Likewise, countries that did not participate in PISA 2015 or that are switching from the PBA mode to the CBA mode may want to begin with the Science units that were newly developed for PISA 2015 (clusters S7-S12).
14. Before starting the translation process, the NPM or the person in charge of translation and adaptation in the National Centre needs to:

- a. Read the PISA2018FT Translation and Adaptation Guidelines a first time thoroughly, and keep this document at hand for consultation.
- b. Appoint translators and reconciler(s), have them sign a confidentiality agreement and ensure that they have appropriate access to the PISA Portal.
- c. Organize a training session for the translators and reconcilers using the support materials (sample units, presentations, guides) available in the Translation Kit. The translation kit will be made available on the portal, under *PISA Portal > Documents > Materials > Field Trial Resources > Translation*.
- d. Give the translators and reconcilers access to guides relevant to their task: translators will refer to the *PISA 2018 Translator's Guide*. The reconciler will refer to the *PISA 2018 Reconciler's and National Reviewer's Guide*. Both guides are available online in two formats: as a short video tutorial explaining the task, as well as in the form of a written user guide that can be consulted online or extracted into a PDF document. The written user guide exists in long and short version: while in the beginning it is good to use the long, detailed version, the shorter version can be used as reference when the translator/reconciler has already familiarized him/herself with the task.
- e. Ensure that translators and reconciler(s) install the PISA 2015 version of the Open Language Tool (OLT). There have been so changes in the software since 2015, so if you have it already installed, there is no need to re-install. If one or several of your assessment languages are right-to-left languages, you can use the same OLT package as for left-to-right languages: the current PISA OLT is a smart version, and it will automatically switch the direction to right-to-left if you select a right-to-left language as target language when you create your project in OLT. OLT installation package can be downloaded from the PISA portal: Documents > Materials > 2018 Field Trial Resources > Translation > OLT.

CHAPTER 3 – TRANSLATION

15. This section is about materials that need to be translated i.e. that your country has not administered in previous cycles. Countries should organise for the translation of material using the “**double translation and reconciliation**” procedures described in the NPM manual and following the advice provided in *PISA Translation/Adaptation Guidelines*. National translation procedures must have been agreed through the Translation Plan before starting the translation.
16. One of the roles of the *reconciler* of the translations or *adaptor* (the person in charge of adaptations) is to document all national adaptations in the test material that the translation/adaptation team deemed necessary. S/he will do this by completing the *Test Adaptation Spreadsheets (TAS)*.

17. All computer-based materials are translated and reconciled in xliiff format using the Open Language Tool (OLT).
18. The TAS for new materials are arranged per released batch and there is a separate worksheet for each unit. Both translators and reconcilers should react to the item-per-item guidelines as explained in the relevant user guides.
19. The Trend TAS (used only by countries that did not administer computer-based assessment in 2015) are arranged per domain and there is one TAS per domain. For Science Trend, there is a separate TAS for 'old' trend (coming from cycles prior to 2015) and 'new' trend (coming from 2015).
20. It is important to carefully read the TAS Instructions (in a separate worksheet of the TAS) **before** using them. Figure 1 below shows a New Reading TAS.

Figure 1. Screenshot from a New Reading TAS

A	B	C	D	E
PISA2018FT		TEST ADAPTATION SPREADSHEET (TAS)		
Country:		R540 Building a Legend		RECONCILIATION National Centre
Language:				COUNTRY COMMENT (ADAPTATIONS, DOUBTS, DIFFICULTIES)
LOCATION	SEGMENT ^M	ENGLISH SOURCE VERSION	ITEM-SPECIFIC TRANSLATION/ADAPTATION GUIDELINE	
Unit Name	2	Building A Legend	if possible, maintain the play on words with the verb "build".	
Legend		A map of the path of the wall under the Ming Dynasty. Current borders for China and Mongolia are shown.		
Stimulus - Paragraph 1	3	Throughout history, humankind has had the urge to build.	Translate "had the urge to" in the sense of "felt the need to".	

21. All item-per-item translation and adaptation guidelines are listed in the TAS and need to be considered carefully.
22. It is recommended to translate the stimulus first, and then the items, even if the segments in the XLIFF do not follow this order. For Global Competence, it makes sense to translate the stimuli first (if a stimulus is available – some units do not contain a separate stimulus), then the chat segments and the items. To be able to understand the conversation flow in the chat, one needs to refer to the TAS where it is documented who is the "actor" (i.e. the one talking) and what was the preceding chat line. For more information about translating the chat segments in Global Competence units, please refer to specific guide available among the [User Guides](#), as well as the Instructions worksheet within the TAS.
23. Once the double-translation and reconciliation process has been completed and feedback from experts of your National Committee have been implemented in your reconciled version, the final national version and related TAS should be submitted for international verification.

24. The submission dates for this material should be as agreed in your Preferred Verification Schedule (PVS). This form should have been sent to pisa.verif@capstan.be by e-mail before the NPM meeting in Prague. If this was not done, please fill-in the form and send it to cApStAn as soon as possible.
25. Note that the double translation and reconciliation process is the same for trend units that are regarded as new for your country, for new Reading units, for Global Competence and new Financial Literacy units. The TAS is a monitoring tool in which:
- item-specific guidelines are listed;
 - reconcilers document national adaptations;
 - verifiers describe their interventions;
 - the translation referee comments on some verifier interventions and labels some as requiring follow-up;
 - national reviewers react to verification feedback;
 - final check reviewers document resolution of corrections requiring follow-up.

CHAPTER 4 – VERIFICATION AND FINAL CHECK

26. The workflow per cluster (or per batch of units) followed for translation continues to apply for the verification process: you will upload XLIFF files and TAS for each cluster or batch of units at the exact location in the PISA Portal's 'Tasks' tab where you downloaded them. Once the complete set of files belonging to a cluster or batch is uploaded, the verification can begin. For PISA 2018, cApStAn will be the verification co-ordinator for all translated/adapted test materials.
27. Please refer to the PISA 2018 Reconciler's and National Reviewer's Guide and video tutorial for a step-by-step description of the CBA verification processes.
- The verifier compares each segment to the source (for equivalence) and verifies linguistic correctness. S/he will enter edits in the XLIFF files and document these interventions in the TAS, using a set of *Verifier Intervention Categories*.
 - The Translation Referee (Béatrice) will review the verifier comments in the annotated TAS, comment on all interventions and label some of them as requiring follow-up. The referee never edits the XLIFF files. If the verifier proposes to fix a purely linguistic issue, the Translation Referee may not label this as requiring follow-up. This means that the

issue will not be checked again at final check. It does not necessarily mean that the correction is less important.

- You will then be notified, and you will download verified XLIFF files, the annotated TAS, and the Differences Report. The Differences Report is an automatically generated Excel file that shows all segments in which the verifier has made an edit versus the original reconciler's version. See Figure 2 below for a screenshot of a DIF report.
- You will review the verifier interventions and the Translation Referee's comments. If your National Centre (NC) disagrees with a correction labeled as requiring follow-up by the Referee, this should be discussed with her until agreement is reached. You will review the verifier interventions and the Translation Referee's comments. If your National Centre (NC) disagrees with a correction labeled as requiring follow-up by the Referee, this should be discussed with her until agreement is reached. In this latter case, please document the reason for your disagreement in the TAS and potentially provide another alternative (in English). Then return the TAS to the referee either via portal OR by email. In either case, please let the Referee know which units are concerned. This notification can be given either by email or by using the comment functionality on the portal.
- You can edit the XLIFF files at this stage. At this point any layout issues documented by your National Centre or by the verifier in the TAS have not yet been addressed. If you spot additional layout issues that have not yet been documented in the TAS, please add them. When helpful, you're welcome to add screenshots to explain the issue.
- The Core A Contractor will take care of layout and format check based on entries in the TAS form.
- At "Verifier final check" cApStAn checks whether all "corrections requiring follow-up" are addressed correctly and consistently.
- After the "Verifier final check" you will again review the verifier final check feedback using the TAS and the DIF reports, as well as check that all residual layout issues have been addressed. If further changes are needed at this point, either to fix layout or a residual linguistic issue, you will need to request this per email (PISA-Cognitive@ets.org).

Figure 2. Screenshot of a DIF report

Segment-id	Seg#	Source	Reconciliation	Verification Review
S611_question1_itemTitle1	2	Air Ions Question	Air Ions question	Air Ions question Question
S611_question1_itemDirections1	4	<i>Refer to "Air Ions" on the right. Click on a choice to answer the question.</i>	<i>Refer to "Air Ions" on the right. Click on a tick box to answer the question.</i>	<i>Refer to "Air Ions" on the right. Click on a tick-box choice to answer the question.</i>

CHAPTER 5 – TREND REVIEW (ONLY COUNTRIES SWITCHING FROM PB TO CB)

28. This section only concerns those countries that have participated in earlier PISA cycles in PB mode, and are now switching to CB mode for the first time.
29. Centralized management of national versions of trend materials is an important feature of the PISA 2018 survey cycle (as it was in 2015). Although there are some minor wording differences between the CB and PB versions of trend materials, particularly at the level of prompts and instructions, the stimuli and items are, for the most part, identical. This means that changes to existing trend content will be limited to
- Correcting outright errors that have had an impact on item performance in PISA 2015. These changes will be requested by the National Centre in the TAS.
 - Changing the wording to accommodate the computer-based platform (such as “Circle...” to “Click...” in the recurring instructions). These changes will already have been made in your computer-based units when you start reviewing them.
30. The National Centre will not have access to the XLIFF files at any point of the process: all changes in trend materials will be implemented centrally by Core D contractor (cApStAn). You will, however, have access to the previews of the unit on the PISA portal, so that you can review them and refer to them throughout the process.
31. The dispatch for the of trend materials will consist of:
- Test Adaptation Spreadsheets (TAS) in Excel format, containing item-per-item guidelines (one TAS per cluster). Differences between CB and PB versions are listed in the TAS.
 - Preview widget on the PISA Portal to allow previews of the English and French source and the national version.

Figure 3. Screenshot from a Reading Trend TAS showing CB-specific instructions

PISA2018FT		TREND UNITS - READING		TEST ADAPTATION SPREADSHEET (TAS)	
Country: Language:					
				NATIONAL REVIEW National Centre	
LOCATION	SEG- MENT N°	ENGLISH SOURCE VERSION	ITEM-SPECIFIC TRANSLATION/ADAPTATION GUIDELINE	COUNTRY COMMENT REQUEST FOR CHANGE VERSUS ARCHIVE VERSION: Description of desired change (in target language) and justification (in English)	
R055 DRUGGEDSPIDERS					
	Stimulus (article)				
Q1	Directions	4	Refer to "Drugged Spiders Drop Stitches" on the right. Click on a choice to answer the question.	New directions for computer-based. Maintain across-units consistency	
	Question				
Q2	Directions (same for Q3 and Q4)	17 22 27	Refer to "Drugged Spiders Drop Stitches" on the right. Type your answer to the question.	New directions for computer-based. Maintain across-units consistency	
	Question				

32. The computer versions of your trend units were created transferring text from your existing paper booklets in a semi-automated way into the XLIFF files and your task is to check that there were no mistakes in that process and that you agree with the proposed translations for the new CB-specific prompts and instructions.
33. You will need to perform a careful review of units imported into the CB format by Core D. A support document is provided for this purpose, in which a number of issues that require the national reviewer's attention are listed:
<CY7_1603_Checklist_for_reviewing_transferred_Trend_Units.docx>.
34. You can use the PDF files of your paper-based units available on the portal in *Documents* > *Archive* 2015 as a reference when you review the computer-based units. These PDF files were created by retrieving your existing paper-based materials and organizing them into the clusters for PISA 2018. What you see in the computer versions should, for the most part, match what you see in these PDF files. (And what is different is mentioned in the TAS and in the file <CY7_1603_PB-to-CB_changes>).
35. If you find any errors in the computer versions, you will need to record those so they can be corrected:
- Content errors (e.g., a typographical error, a sentence that was not correctly transferred into the computer files, etc.) should be documented in the Translation Adaptation Spreadsheet (TAS) by adding a note in "COUNTRY COMMENT" column.
 - Serious layout issues (e.g., a word is overlapping a diagram, etc.) should be documented in the TAS. You are welcome to add a screenshot to clarify the issue. Layout issues will be addressed by Core A contractor during the Layout Adaptation step.
 - Please note that the review process by National Centres does not include making changes directly into the XLIFF files for trend units. It is, in fact, not possible for you to

do so. Identified and approved corrections will be made by the verifiers (in the case of content issues) or by the Core 2 technical team (in the case of layout issues).

36. Once you have completed the review process and documented your possible change requests in the TAS, you will need to submit the TAS to the Translation Referee who will take a first look at the content-related change requests you have documented and your justification for these changes, and decide whether the change is acceptable or not. This may involve some exchanges between your National Centre and the Referee. In some cases, the Referee will need to wait for the input from the verifier to be able to make the judgement.
37. After the initial Referee review, the verifier will implement all those changes that were accepted by the Referee and provide his/her opinion on those that require knowledge of the test language. After this the Referee will have a second look at the change request (now with verifier's input) and gives her final judgement.
38. Once the Referee review is completed, Core A contractor will address the layout issues documented by your National Centre or the verifier in the TAS.
39. In the post-verification review, you will launch the previews of your updated units to make sure that accepted changes have been correctly implemented by the verifier and layout issues have been fixed in a satisfactory way by the Core A contractor. If additional issues are spotted, you will need to request for changes in the TAS.
40. After your post-verification review, the files will again go to the verifier who will address the residual issues, together with Core A, if these require fixing the layout.
41. In the Final Review you will check that there are no more issues and sign off on the units. If at this stage you still spot residual layout or linguistic issues, you will need to request changes per email (PISA-Cognitive@ets.org).

CHAPTER 6 – CODING GUIDES

42. There will be paper-based coding guides for all open-ended items of all domains (except Global Competence that does not include items that require manual coding). Master versions of these guides will be provided as templates by Core A and made available on the PISA Portal.
43. All coding guides (in Word format) will include the item text and scoring instructions for constructed response items only. The actual stimuli will not be reproduced in the coding guides. For trend Mathematics, trend Reading, trend Science and trend Financial Literacy items, there will be a single coding guide for each domain, organised by cluster.
44. New Coding Guides will follow the same translation and verification process as the units, except that coding guides do not need to be double-translated, a single translation followed

by reconciler review (if possible with cross-check against the French source) is considered sufficient.

45. Verification of Coding Guides will take place after the coder training when final source versions will be released i.e. the verification window for coding guides will run from February 2017 to April 2017.
46. You will receive information about the preparation of your trend coding guides at a later stage.

NEW COUNTRIES ADMINISTERING PAPER-BASED TEST

47. This section concerns only those countries that administer paper-based assessment and participate in PISA for the **first** time.

CHAPTER 7 - VOLUME, FORMAT AND DISPATCH SCHEDULE OF MATERIALS

Amount of material to translate/adapt/review and dispatch schedule

48. The updated translation kit contains a document listing all units to be translated and their word count in the English source version (see CY7_1603_Cognitive_Units_PISA_2018_Field Trial). All these units have been administered in various PISA cycles before PISA 2018, there are no newly developed PB units in PISA 2018.
49. The expected dispatch schedule and volumes are the following:

Trend Math units

- English and French source versions of 40 units (6 clusters) with approximately 6,500 words will be released on **1 April** as a single batch. This release will also include coding guides in English to be used for reference while translating the items.

Trend Reading units

- English and French source versions of 25 units (6 clusters) with approximately 16,000 words will be tentatively released on **1 April** as a single batch. This release will also include draft coding guides in English to be used for reference while translating the items.

Trend Science units

- English and French source versions of 32 trend science (6 clusters) units with approximately 11,000 words will be released on **1 April** as a single batch. This release will also include coding guides in English to be used for reference while translating the items.

50. The dispatch for the PB versions of trend materials will consist of:

- Source paper-based clusters in MS Word format (6 files per domain).
- Test Adaptation Spreadsheets (TAS) in Excel format, containing item-per-item guidelines (one TAS per cluster).
- Note that the booklet shell which consists of all parts that are common to each booklet (including formula sheets, general directions, sources acknowledgment etc.) will be dispatched a bit later.

51. Table 3 below shows the key dates for translation, adaptation and verification at Field Trial stage.

Table 3. Key dates in the Translation, Adaptation and Verification Timeline

Domain	Action	Who?	Date
Trend Materials listed above	Beginning of translation/adaptation of trend materials	PBA Countries that did not participate in PISA 2015	April 1, 2016
Trend coding guides	Translation, adaptation	Countries that did not participate in PISA 2015	Can start once cognitive units have been translated
	Verification	cApStAn	February 2017 onwards

CHAPTER 8 – GETTING STARTED

52. Countries administering paper-based assessments will not have any new cognitive materials (materials developed for PISA 2008) to translate/adapt. Only trend items will be administered.

53. The Translation Kit for trainers of translators and reconcilers will be made available after the NPM Meeting in Prague, so that countries can begin the translation/adaptation of materials as soon as these are dispatched. This Translation Kit contains all files, instructions and examples needed to get started.

54. To begin working on the PB version of the materials, the NPM or the person in charge of translation and adaptation in the National Centre needs to:

- a. Read the PISA2018FT Translation and Adaptation Guidelines a first time thoroughly, and keep this document at hand for consultation.
- b. Appoint translators and reconciler(s), have them sign a confidentiality agreement and ensure that they have appropriate access to the PISA Portal.
- c. Organize a training session for the translators and reconcilers using the support materials (sample units, presentations, guides) available in the Translation Kit. The translation kit will be made available on the portal, under *PISA Portal > Documents > Materials > Field Trial Resources > Translation*.
- d. Give the translators and reconcilers access to guides relevant to their task: translators will refer to the *PISA 2018 Translator’s Guide*. The reconciler will refer to the *PISA 2018 Reconciler’s and National Reviewer’s Guide*. Both guides are available online in two formats: as a short video tutorial explaining the task, as well as in the form of a written user guide that can be consulted online or extracted into a PDF document. The written user guide exists in long and short version: while in the beginning it is good to use the long, detailed version, the shorter version can be used as reference when the translator/reconciler has already familiarized him/herself with the task.

CHAPTER 9 – TRANSLATION

55. Countries should organise for the translation of material using the “**double translation and reconciliation**” procedures described in the NPM manual and following the advice provided in *PISA Translation/Adaptation Guidelines*. National translation procedures must have been agreed through the Translation Plan before starting the translation.
56. One of the roles of the *reconciler* of the translations or *adaptor* (the person in charge of adaptations) is to document all national adaptations in the test material that the translation/adaptation team deemed necessary. S/he will do this by completing the *Test Adaptation Spreadsheets (TAS)*.
57. The TAS are arranged per cluster: there is one worksheet (or sometimes two or three worksheets, depending on the length of the units) per cluster.
58. It is important to carefully read the TAS Instructions (in a separate worksheet of the TAS) **before** using them. Figure 4 below shows a Reading TAS.

Figure 4. Screenshot from a Reading Trend TAS for a PB country

PISA2018FT		READING CLUSTER 1		TEST ADAPTATION SPREADSHEET (TAS)		PIB NEW	
Country: Language:				RECONCILIATION Reconciler Comment		VERIFICATION Verifier Comment	
LOCATION	ENGLISH SOURCE VERSION	ITEM-SPECIFIC TRANSLATION/ADAPTATION GUIDELINE	COUNTRY COMMENT (ADAPTATIONS, SOURCE DIFFICULTIES)	VERIFIER INTERVENTION	VERIFIER COMMENT		
R219 EMPLOYMENT							
STIMULUS (application form)							
Top part of form (shaded)							
	EVER WORKED FOR OUR STORE BEFORE?	"Store" may be adapted to "restaurant" or similar, if this is more appropriate in your language. If you adapt, please do so consistently (further occurrences are listed in the TAS)					
Middle part of form (unshaded)	MTWTFSS	The order of days of the week may be adapted to what is conventional in your country					

59. All item-per-item translation and adaptation guidelines are listed in the TAS and need to be considered carefully. The TAS is a monitoring tool in which:

- item-specific guidelines are listed;
- reconcilers document national adaptations;
- verifiers describe their interventions;
- the translation referee comments on some verifier interventions and labels some as requiring follow-up;
- national reviewers react to verification feedback;
- final check reviewers document resolution of corrections requiring follow-up.

60. Once you have produced two translations; once your reconciler has merged the two translations, selecting the best elements from each; and once feedback from experts of your National Committee have been implemented in your reconciled version, the final national version and related *Test Adaptation Spreadsheets* should be submitted for international verification.

61. The submission dates for this material should be as agreed in your Preferred Verification Schedule (PVS). This form should have been sent to pisa.verif@capstan.be by e-mail before the NPM meeting in Prague. If this was not done, please fill-in the form and send it to cApStAn as soon as possible.

62. The Booklet Shell (common booklet parts) will follow the same process as the units.

CHAPTER 10 – VERIFICATION AND FINAL CHECK

63. The workflow per cluster followed for translation and review of trend items continues to apply for the verification process: you will upload MS Word files and TAS for each cluster at the exact location on the PISA Portal's 'TASK' tab where you downloaded them. Once the complete set of files belonging to a cluster is uploaded, the verification can begin.
64. The verification process will take place as follows:
- cApStAn's verifier compares each sentence to the source (for equivalence) and verifies linguistic correctness. S/he will enter interventions in the MS Word cluster, in track changes, and document the interventions in the TAS, using an updated set of *Verifier Intervention Categories*.
 - The Translation Referee will review the verifier comments in the annotated TAS, comment on some interventions and label some of them as requiring follow-up. If the verifier proposes to fix a purely linguistic issue, the Translation Referee may not label this as requiring follow-up. This means that the issue will not be checked again at final check. It does not mean that the correction is less important.
 - You will then be notified, and you will download the verified clusters and the annotated TAS from the Portal. The TAS contains comments from both the verifier and the Translation Referee. If your NC disagrees with a correction requiring follow-up, this should be discussed with the Translation Referee until agreement is reached. In this latter case, please document the reason for your disagreement in the TAS and potentially provide another alternative (in English). Then return the TAS to the referee either via portal OR by email. In either case, please let the Referee know which units are concerned. This notification can be given either by email or by using the comment functionality on the portal.
 - cApStAn will then check whether all "corrections requiring follow-up" are addressed correctly and consistently.
 - Once the process is completed, the PB booklets will be centrally assembled by Core A, and you will receive them for review in PDF format.

CHAPTER 11 – CODING GUIDES

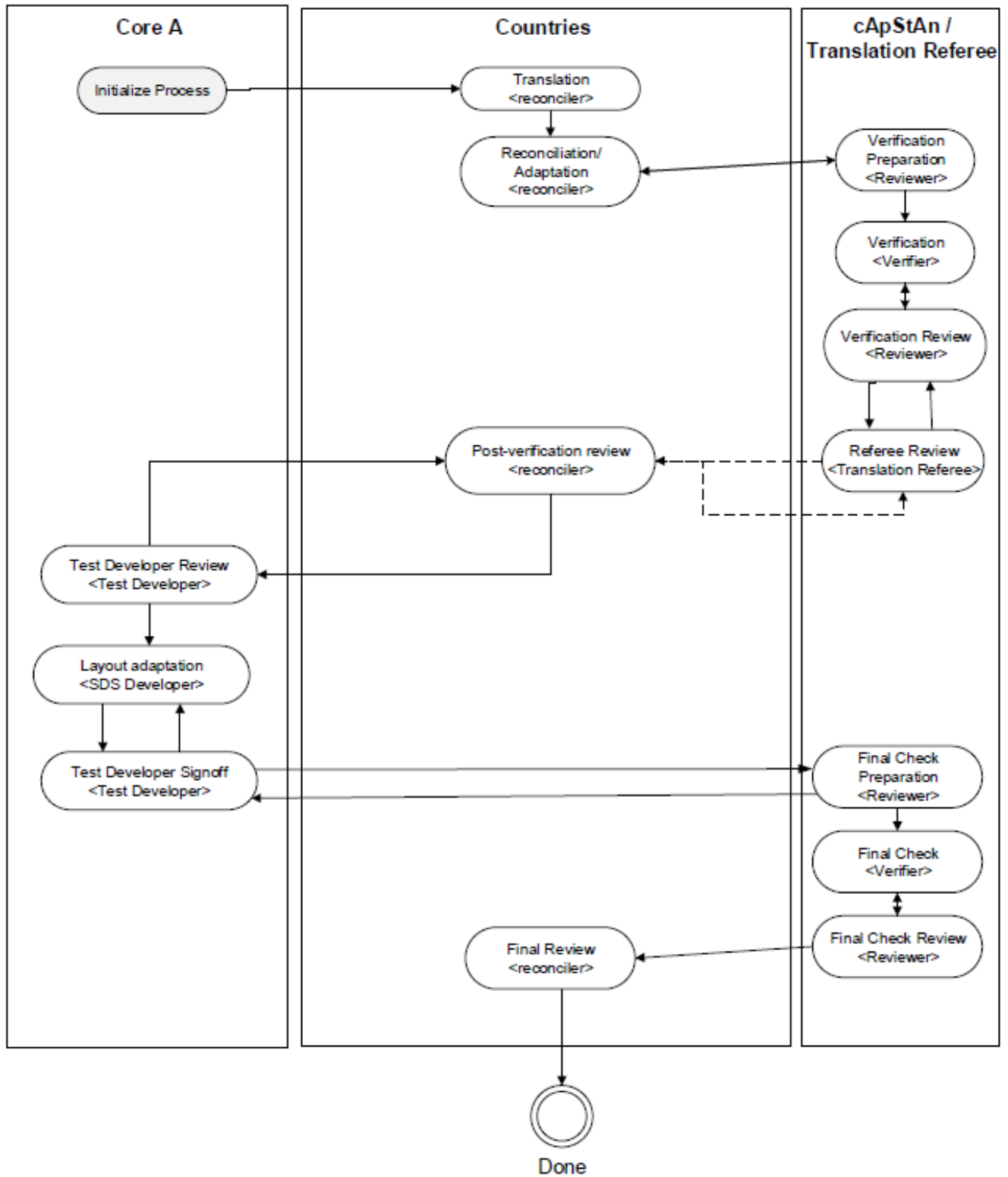
65. There will be coding guides for all open-ended items of all domains. Master versions of these guides will be provided by Core A and made available on the PISA Portal.

66. All coding guides (in Word format) will include the item text and scoring instructions for constructed response items only. The actual stimuli will not be reproduced in the coding guides. For trend Mathematics, trend Reading and trend Science items, there will be a single coding guide for each domain, organised by cluster.
67. Coding Guides will follow the same translation and verification process as the unit, except that coding guides do not need to be double-translated, a single translation followed by reconciler review (if possible with cross-check against the French source) is considered sufficient.
68. Verification of Coding Guides will take place after the coder training when final source versions will be released i.e. the verification window for coding guides will run from February 2017 to April 2017.

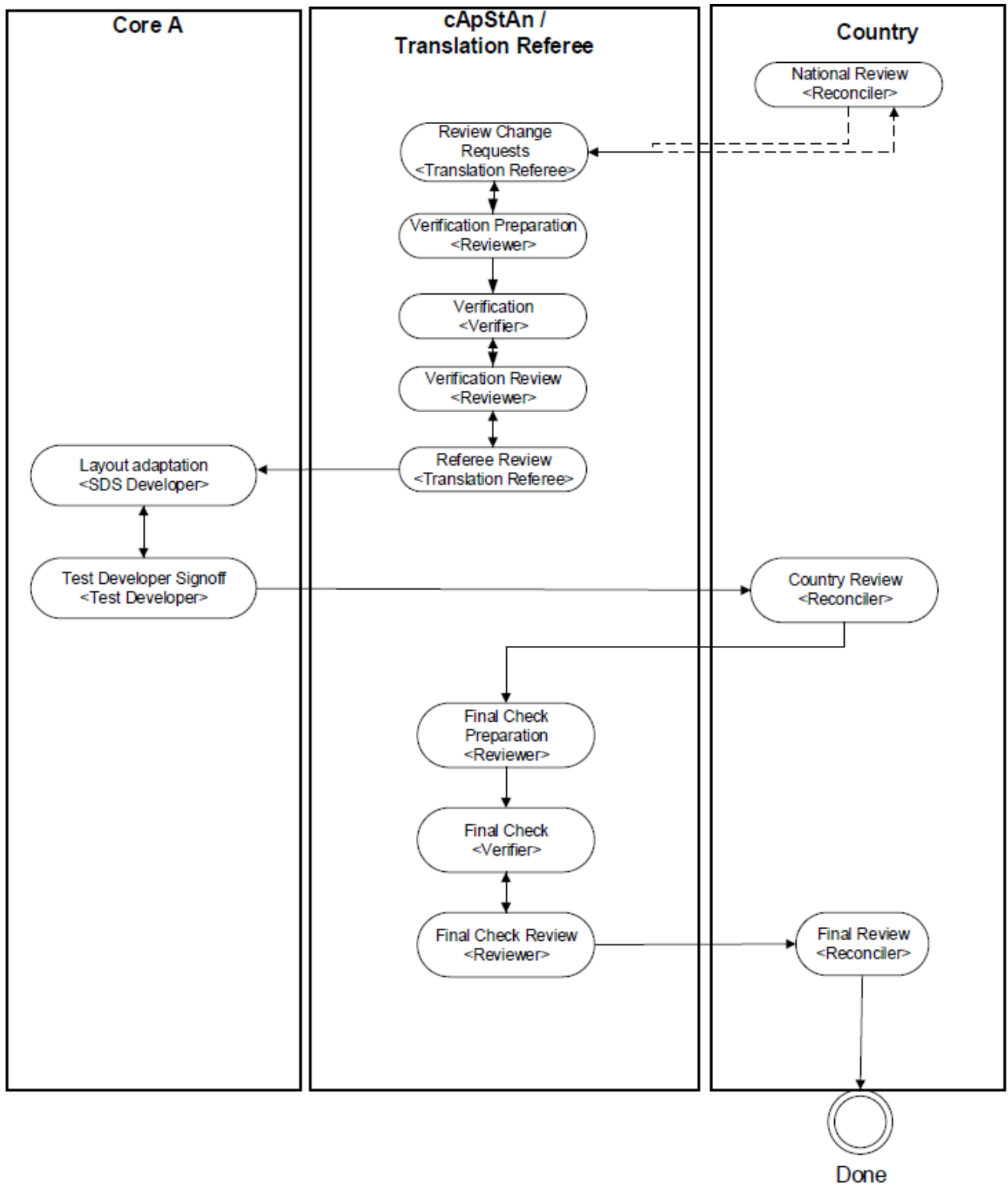
OLD COUNTRIES ADMINISTERING PAPER-BASED TEST

69. This section concerns only those countries that participated in PISA 2015 and administer paper-based test.
70. Countries administering paper-based assessments will not have any new cognitive materials (materials developed for PISA 2008) to translate/adapt. Only trend items will be administered. Therefore there is no work involved in preparing the units, but there may be some updates needed in your Booklet Shell.
71. PB clusters and later booklets will be assembled centrally by Core A based on your PISA 2015 units, and will be sent to you for review.

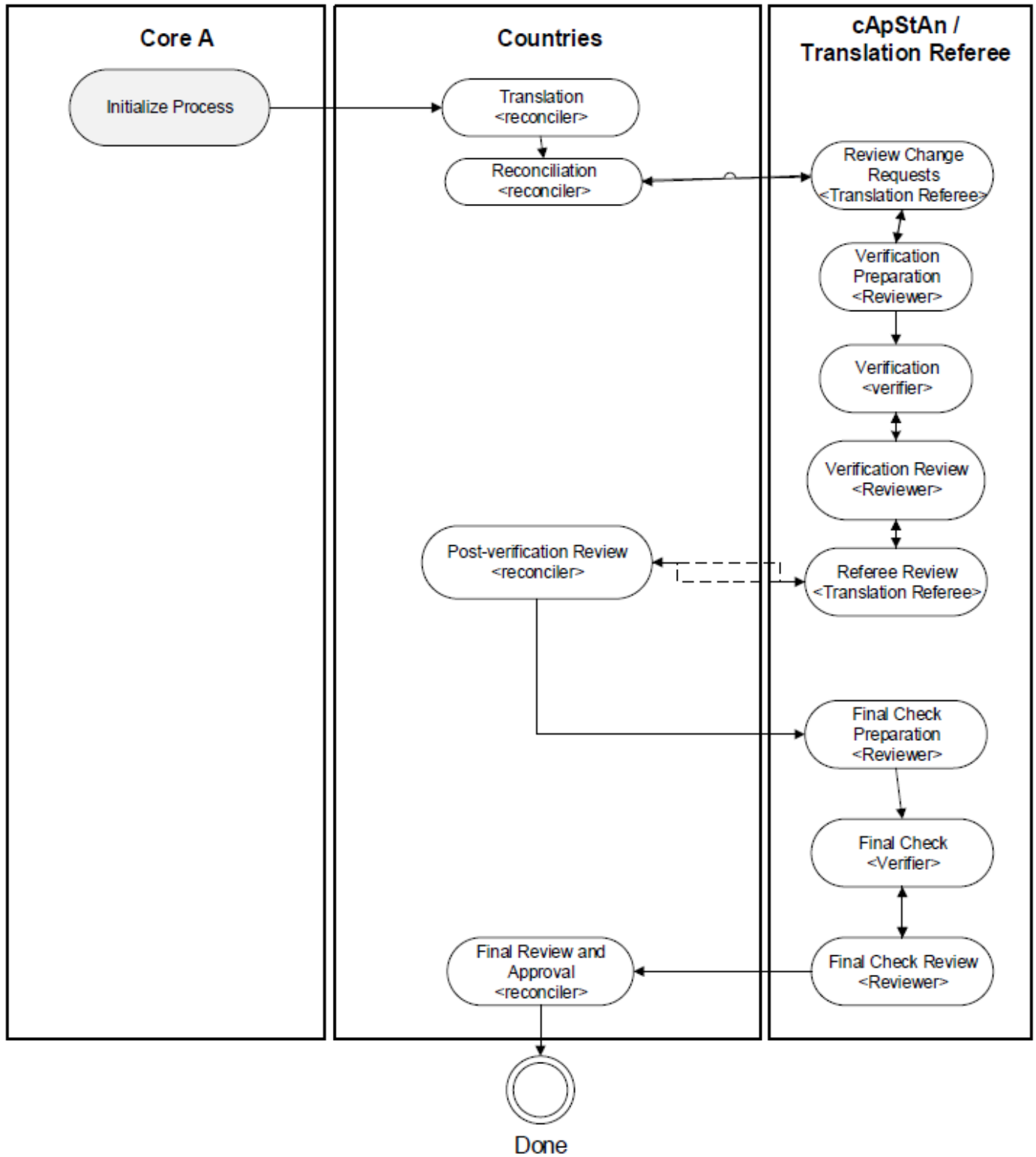
Annex 1 – Cognitive Translation and Verification Workflow (PISA 2018 – CBA – Full Translation of New Units)



Annex 2 – Cognitive Translation Workflow (PISA 2018 CBA Trend Units)



Annex 3 – Cognitive Translation Workflow (PISA 2018 – Coding Guides)



Annex 4 – Cognitive Translation Workflow (PISA 2018 – PBA New)

