

Closed Captioning Standards and Protocol for Canadian English Language Broadcasters

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Joint Societal Issues Committee
on Closed Captioning Standards

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Captioning in Canada

Introduction

Television is recognized as the most popular source of information and entertainment in the world. By making a full variety of television programs accessible with closed captions, Canadian private broadcasters enable the involvement of Deaf, deaf, deafened, and hard of hearing people in popular culture. Caption providers, therefore, bear an important responsibility to supply complete, accurate, consistent, and clear renderings of program audio elements.

The goal of closed captioning is to meet the needs of Deaf, deaf, deafened, and hard of hearing people. In addition, although these are the primary consumers, captioning is also a valuable tool for the general public with many applications such as the development of reading and literacy skills for all ages and cultures.

Canada's broadcasters are committed to improving accessibility for everyone, and they have been instrumental in advancing captioning technology to this end. Every year, the broadcasting industry invests significant financial and human resources in the research and development of captioning technology, as well as in program captioning. In this way, closed captioning has become an integral part of Canadian television station operations.

Although closed captioning has been quickly and widely implemented in Canada, comprehensive standards for captioning have never been formally developed or consistently applied across the broadcasting industry. In the absence of one set of comprehensive standards, formal training of captioning suppliers has not been possible. The result has been that captioning styles vary from supplier to supplier, sometimes frustrating the captioning viewer. Similarly, caption providers have themselves been frustrated by the lack of standards to guide them.

This handbook, *Closed Captioning Standards and Protocol for Canadian English Language Broadcasters*, is designed to establish English language closed captioning standards acceptable to key stakeholders: the caption consumers, the caption creators, and the broadcasters. It is intended as an authoritative guide to Canadian English language closed captioning for television. The participation in and implementation of these standards across the broadcasting industry will promote consistency as we strive to achieve the highest level of quality in Canadian English language closed captioning.

Regulatory Context

The *Canadian Broadcasting Act* requires that, within the Canadian broadcasting system, accessible programming be provided as resources become available. Broadcasters thus contribute to the public interest by continually working to improve access to their programming for Deaf, deaf, deafened, and hard of hearing people.

The Canadian Radio, Television and Telecommunications Commission's (CRTC) policy on closed captioning is set out in Public Notice CRTC 1995-48, *Introduction to Decisions Renewing the Licences of Privately-Owned English-Language Television Stations*. The policy recognizes that the financial resources available to each broadcaster are different. Under the policy, television stations earning more than \$10 million in annual revenues were required, by September 1, 1998, to caption all local news, including live segments.

The policy also requires that all such licensees close caption at least 90% of all programming during the broadcast day by the end of individual licence terms. Medium and smaller television stations are respectively expected, or encouraged, to meet the same standards.

In its call for applications for licences for new digital, pay, and specialty television services, Public Notice CRTC 2000-22, the Commission stated that it expects applicants for new services to commit to close captioning at least 90% of their broadcast day by the end of their licence term.

Audience and Applications

Deaf, deaf, Deafened, and Hard of Hearing Consumers

The distinction between the terms Deaf, deaf, deafened, and hard of hearing is based principally on preferred modes of communication.

Deaf (upper case 'D') is a term that refers to members of a socio-linguistic and cultural group whose primary language is sign language. In English-speaking parts of Canada, the main sign language is American Sign Language (ASL).

Deafened and deaf (lower case 'd') are terms that refer to individuals who have lost all or most functional hearing at some point in their lives. These people use spoken language and rely on visual forms of communication such as speechreading, text, and, in some cases, sign language.

Hard of hearing is a term that refers to individuals who have a hearing loss ranging from mild to profound and who use their voice and residual hearing and, in some cases, sign language for communication.

Closed captions are primarily designed for the benefit of Deaf, deaf, deafened, and hard of hearing people.ⁱ There is strong evidence that this portion of the caption audience will continue to increase. With shifting demographics (the "greying" of the baby boom generation) and the increasing incidences of noise-induced deafness, these populations are expected to grow markedly in the next 10 years. It follows that the market for accessible programming will also expand.

Other Applications

Since their inception, closed captions have found a number of other audiences and are increasingly becoming an important communication tool for people other than the Deaf, deaf, deafened, and hard of hearing people for whom they were initially intended.

Literacy Development

Studies show that literacy development may be improved through the use of closed captions. This holds true for the culturally Deaf, whose first language is likely to be American Sign Language, and anyone else studying English as a second language, as well as children learning to read. Through captions, viewers can read authentic language and see how it is used in a variety of situations.ⁱⁱ

Public Venues

Closed captioning is a value-added service for many businesses. Public venues such as restaurants and fitness clubs may choose to have a TV with captions on so that many patrons may watch and "read" a television program while others are undisturbed by TV sound.

Viewer Preferences

Now that closed caption decoders are built into most television sets and captions often come on automatically when audio is muted, the audience for captioning has grown to include those who choose to watch a program in silence. They may choose to read closed captions when others are sleeping, on the phone or studying, or they may prefer reading captions to listening. In addition, others may choose to read captions while listening.

Transcripts

A by-product of closed captions is the transcript created. Caption transcripts are already used for archives and web pages and for translation into foreign language subtitles and voice-overs. Other uses for the scripts have yet to be fully explored in terms of data-based video indexing.

Types of Closed Captioning

All closed captioning requires skilled people to prepare and perform it. There are two primary formats: off-line captioning and on-line captioning. Off-line captioning has two common styles: roll-up and pop-on. On-line captioning has three common styles: real-time, live-display, and Teleprompter.

In future, voice recognition technology may develop to a point where it can be applied to closed captioning. This format has been tested and continues to be investigated for its potential in this field. However, automated captioning does not seem achievable in the foreseeable future.

Off-line Captioning

The term “off-line” refers to captions that are created for and applied to pre-recorded programs.

Trained off-line caption writers watch and listen to videotaped programs and create a transcript of the audio, including descriptions of non-speech information. They use a specialized computer program to enter what they hear on a standard computer keyboard. They break up the transcript into phrases, which will either roll up on or pop on the video screen. The caption writer assigns a timecode address to each caption as well as a position code. The following three elements make up the closed captioned data file: the text, the timecode addresses, and the position codes.

This data is transferred to a captioned sub-master videotape by encoding while dubbing from the edited master. In the encoding process, caption data is permanently embedded in the video signal of the captioned sub-master. The playback tape will always remain unchanged, and the duplicate captioned sub-master will contain the new caption data.

Because off-line captions are pre-produced, they can be edited to ensure clarity and accuracy. They are by far the most labour-intensive and expensive to create. It may take 18 hours or more to off-line caption a one-hour program, depending on the complexity of the program, speaking rate, rate of scene change, and difficulty of topic. In a general breakdown, captioning time includes the following:

- 1 hour to create a working copy tape from the master in real time
- 1 hour to capture the video onto the captioning system in real time
- 12 hours to transcribe, place, time, and edit the captions, creating the data file at a rate of approximately five minutes of video per person hour
- 1 hour research time
- 2 hours to screen the work
- 1 hour to transfer the data while dubbing in real time from the master tape to the closed captioned sub-master

Off-line caption writers must strive for accuracy, taking the time to carefully research all names and unfamiliar words or phrases. For more information, see Appendix 4: Essential Vocabulary for Reference on page 55.

They must also screen thoroughly. Proofing a hard copy printout of the caption transcription before encoding is an excellent method of screening for errors. Additionally, a second person should view the captions before encoding.

Pop-on Captions

Off-line pop-on captions are appropriate for all types of programming. They are the only type of captions well suited to dramas, sitcoms, movies, and music videos, and they are therefore recommended for these types of programming. They are also the preferred style for documentaries and children's programs.

Pop-on captions are the most heavily edited of the caption formats. Though every effort is made to preserve the verbatim script wherever possible, limitations of space and time often mean that the text must be reduced. Editing pop-on captions is a highly refined process that requires strong language skills, responsibility, and discretion.

Off-line pop-on captions appear on the screen in blocks of varying shapes. They can appear anywhere on the screen, which creates a wide range of practical and aesthetic advantages.

For considerations specific to pop-on captions, see *Guidelines for Pop-On Captions*, pages 29-38.

Roll-up Captions

Off-line roll-up captions are not well suited to dramas, sitcoms, movies, children's programs, or music videos, and their use for these types of programming is discouraged.

Off-line roll-up captions are normally reserved for programs that have a live flavour, such as entertainment, sports and news magazines, awards programs, and lifestyle programs. They may sometimes be applied to other program styles. When, for example, the speaking rate is extremely fast, verbatim roll-up captions may be preferable to highly edited pop-on captions. Or, if deadlines are extremely tight, roll-up captions may be used because they can be prepared more quickly than pop-on captions.

Off-line roll-up captions are generally two or three lines of text that can scroll anywhere on the screen. They are generally verbatim representations of the program audio.

For considerations specific to roll-up captions, see *Guidelines for Off-Line Roll-Up Captions*, pages 39-41.

On-line Captioning

The term "on-line" refers to captions that are encoded simultaneously with a broadcast. They normally appear in a scrolling format, similar to off-line roll-up captions.

Real-time Captions

Real-time captions are not well suited to dramas, movies, sitcoms, music videos, children's programs, or documentaries, and their use for these types of programming is discouraged. However, in the rare situation that these types of programming are not available with captions when captions have been promised, and if there is no time to produce off-line or live-display captions, it is advisable to apply real-time captioning rather than to have no captions at all.

Real-time captioning is a significant technological innovation, and, while there is a margin of error inherent in this method, it is the only one that enables the closed captioning of live news, sports, and other live event programming.

On-line real-time captions are created and performed by highly trained caption stenographers who watch and listen to live broadcasts. They use a specialized phonetic keyboard and shorthand to enable them to write as quickly as a person speaks. The phonetic script is converted into conventional English in as little as two seconds and is encoded while the live broadcast occurs.

A skilled caption stenographer listens to a program and writes the speakers' words in what is called steno, short for stenotype, a form of phonetic shorthand based on a special 24-key keyboard where words are written by syllable, and common words can be written in one stroke of the hands. The steno is fed into a computer dictionary that the caption stenographer has pre-programmed. This dictionary contains the English translation for steno codes, which the computer processes and translates back into English captions.

When captioning in real-time, the caption stenographer must hear the information, mentally process that information, and write it in steno. The computer then translates that steno back into English and sends the information by modem out to the broadcaster's encoder, where the captions are inserted on air. The whole process necessarily creates a time delay of two to six seconds between the speakers' words and the appearance of captions on screen.

Although caption stenographers write phonetically, they must specify which form of sound-alike words, such as by/buy/bye, to translate, and they must also specify deviations in normal spelling. For example, the proper name "Greene" must be written differently from the word "green" in order for the computer to translate it properly. Caption stenographers must also determine and insert punctuation as they write and must be very precise in the stroking of the keys. Not enough pressure or too much pressure on one key can turn the intended word into a totally different word.

Mistakes in real-time captioning can look like spelling errors. However, they are often the result of a mistranslation by the computer, or what is referred to as an "untranslate," a phonetic rendering of a word that was not pre-programmed into the caption stenographer's dictionary. Adding to these complexities, the speakers' speed, accents, and unfamiliar terminology can contribute to the errors and inaccuracies that you will see in real-time captioning.

High-quality real-time captioning is highly dependent on preparation. It is the caption stenographer's responsibility to prepare his or her dictionary, entering names and vocabulary that he or she can anticipate encountering during the captioning of various programs. For more information, see Appendix 4: Essential Vocabulary for Reference on page 55.

In order to ensure consistent quality and uninterrupted captions during live broadcasts, real-time captioning service providers must always be prepared with adequate back-up personnel and equipment in case of operator fatigue or technical failure.

It is the broadcaster's responsibility to provide any available material such as guest lists, rundowns, key lists and so forth, which are necessary for the caption stenographer to prepare for a program. For more information about the broadcaster's role in real-time captioning, see Production Considerations for Broadcasters and Producers on page 9.

For considerations specific to real-time captions, see Guidelines for On-Line Real-Time Captions, pages 43-46.

Live-Display Captions

On-line live-display captions are often used for the repeat broadcast of a previously live program. The caption stenographer can review a transcript of the original live show between broadcasts and then provide revised, corrected text in sync with a subsequent broadcast. She or he provides the text in real time, line by line, as the broadcast occurs, so that it is encoded in real time.

This method can also be used when the program itself is pre-recorded and the text is created ahead of time, but there is not enough time to produce off-line captions.

Other applications are discouraged.

Live-display captions must be controlled and monitored by a trained person to ensure accurate playback.

For considerations specific to live-display captions, see Guidelines for On-Line Live-Display and Teleprompter Captions on page 47.

Teleprompter Captions

Teleprompter captions should only be applied to programs that are 100% scripted. They are the least acceptable type of captioning because they do not incorporate non-speech information. They are only appropriate when a script has been prepared and is available for an entire broadcast, and when there is no ad-libbing or improvising. Any other application is discouraged.

On-line Teleprompter captions are in the form of a prepared script, which a TV personality reads from a Teleprompter. While the speaker is reading the script, it is simultaneously encoded and broadcasted as closed captions. There is little or no delay between the spoken words and the occurrence of corresponding captions.

For considerations specific to Teleprompter captions, see Guidelines for On-Line Live-Display and Teleprompter Captions on page 47.

Production Considerations for Broadcasters and Producers

Handling Caption Data

Closed captions are an integral part of a TV program or video and must be treated with the same care as the audio and video portions of the program.ⁱⁱⁱ

Continuous, unbroken timecode is essential when encoding off-line captions. If the timecode jumps, disappears, or repeats, the data will be interrupted, and the captions will be erroneous.

It is important to note that line 21 of the vertical blanking interval, where closed-caption data is stored on videotape, can be adversely affected by satellite feeds, time base correctors, frame stores, digital effects, and switchers.^{iv} Every effort should be made to avoid incompatibility between captions and these technologies.

Editing closed-captioned videotape using video inserts or cuts is likely to damage the captions. Edits must therefore be made to the original master, then captions must be revised according to the changed original master, and a new captioned duplicate sub-master tape must be encoded.^v This is because caption data pulses occur before the captions appear. If a pulse is edited out, the subsequent caption will not appear. If a pulse exists for video that has been removed, irrelevant captions will appear.

Because caption data pulses occur before captions appear, the first caption of each program segment must occur at least 15 frames (half a second) into the program, or its timecode cue may be lost in the transition from commercial to program. Also, caption data must be blanked at least 15 frames before the end of each program segment so that irrelevant captions do not bleed into commercial breaks or other programming.

Closed-captioned videotapes, data files, and backup discs should be clearly labelled and organized to ensure their proper handling.^{vi}

Production Considerations

Broadcasters and producers must take captioning into account at all stages of program development and treat it with the same responsibility and sensitivity to their audience as they treat the audio and video elements of television content.

When designing multi-format screens, broadcasters and producers must plan to accommodate captions, which will add yet another visual element to their presentation. For instance, two lines of the screen should be kept free for caption presentation.

Broadcasters must provide captioning suppliers with a list of key production contacts who can supply accurate information about names and special terminology. This information is essential to help on-line caption stenographers prepare their dictionaries in advance of live broadcasts and to help off-line caption writers with their research.

Broadcasters should also provide specific information about programs. This might include names of hosts, guests, news anchors, performers, presenters, and nominees (in the case of awards shows). Any available scripts should be provided, as well as song lyrics not available elsewhere.

Broadcasters should also discuss with the captioning supplier what materials for programs such as newscasts could be easily provided in advance (for example, rundowns and scripts). Additionally, broadcasters must keep caption suppliers informed of any decisions that will affect them, such as changes to on-air personnel and scheduled guests.

Ideally, bumpers should be used at the beginning and end of each program segment during live broadcasts so that real-time caption stenographers have forewarning of the start and finish of each segment. This accommodates the completion of transcription and leaves time to blank captions before the onset of commercial breaks or other programming.

Emergency Captions

In the case of a community emergency, broadcasters must provide all information in both vocal and written formats. If open captions (captions that are visible to all viewers) cannot be employed immediately, then, as a temporary measure, a textual graphic, key, or crawl should be displayed. This information must contain all emergency measures, phone numbers, addresses, and evacuation procedures as necessary. Broadcasters must contact a real-time caption stenographer to provide live open captions as soon as possible.

General Guidelines for Closed Captioning

Preface

The goal of the following guidelines is to limit options for Canadian English language off-line caption writers and on-line caption stenographers in order to ensure consistency and improve quality in the way captioned programming is delivered to Canadian audiences.

For considerations specific to individual types of captioning, see the appropriate sections.

The Four Basic Principles of Captioning

First and foremost, here are four principles that should be applied to all captions:

1. ACCURACY

Accurately presented verbatim transcription is always the goal.

2. RESPONSIBILITY

Even when editing, it is essential to preserve the meaning and intent of the program.

3. CONSISTENCY

Strive for uniformity of style, format, placement, description, speaker designation, rate of display, and so on, within each program.

4. CLARITY

Give a complete and true rendering of program audio: identify who is speaking, include non-speech information, and keep descriptions simple.

Cueing the Viewer

If viewers see mouths moving, they will be looking for corresponding captions. Therefore, all obvious speech must have captions^{vii}.

If two sequential pop-on captions have the same shape and placement, a change of captions may not be detected. It is therefore important to vary the placement of sequential pop-on captions slightly when shapes are identical, but keep them in the same area of the screen.

False Starts and Utterances

When captioning spontaneous conversation, as a rule, do not include nonverbal utterances, repeated words, or false starts to sentences.

However, false starts and utterances must be included when they contribute to the understanding of conversation or personality or are part of a dramatic effect or joke.

On-screen Information

Avoid covering graphics or keys, characters' eyes or lips, or areas of sports action with captions. Caption writers and caption stenographers may use one of the following methods to avoid covering these essential visual elements.

Moving Captions

If captions are moved, ensure that they change position at the end of a sentence or idea and that they have a sufficient presentation rate. For more information, see presentation rate information on pages 30 (pop-on captions), 40 (off-line roll-up captions), and 43 (real time captions). Also ensure that the current screen is blank before moving captions. Be sure to move all of the captions within a segment, scene, or sports play, rather than bouncing captions around throughout a segment, scene, or play, making them difficult or impossible to follow.

1. Use one- or two-line captions placed just above or below the essential visual element.
2. Move the captions to the top or bottom of the screen if there is no essential visual element there.
3. Pop-on captions may be moved to any location on the screen, using three lines if necessary. They should be centre justified or left justified, never right justified.
4. Roll-up captions may revert to a shorter line (though not less than 16 characters) with left justification.
5. If spoken words or lyrics are different from a textual graphic (for example, when there is talking over end credits), full captions must be included and moved using one of the techniques above so as to interfere as little as possible with the essential visual elements.
6. In the case of an extreme close-up of a person, do not cover the person's mouth with captions because many caption consumers speechread along with reading the captions.

Blanking Captions

1. Leave the screen blank during a textual graphic if the voiceover is identical to the graphic and expresses a complete idea or if there is no voiceover.
2. Be sure that the last line of captions before blanking has at least two seconds to display and occurs at the end of a complete sentence or idea.

Including Graphic Information Within Captions

1. If it is not possible to blank or move captions and they cover an important graphic, it is imperative to repeat the graphic information within the caption text.
2. Do not start or end a caption in mid-sentence assuming that a textual graphic will be read in the correct sequence to complete the captioned sentence. For example, the complete phrase, "Tonight's program is brought to you by Sunnybrand Detergent" should appear in captions, even if the Sunnybrand Detergent logo appears as a graphic while the captions are displayed.

Spelling

Use Canadian spelling.

It is essential that caption writers and caption stenographers make use of Canadian dictionaries and style guides for conventional words, as well as international and speciality reference resources to obtain correct spellings for specific topics. Caption writers and caption stenographers are cautioned against relying on the Internet as an authoritative source for accurate spelling and are reminded that no specific reference medium is error free.

Alternative spellings are used for proper names where applicable. For example, the American museum title, THE HARBOR CENTER MUSEUM should not be changed to THE HARBOUR CENTRE MUSEUM; and the British book title, ORGANISING THE ARCHAEOLOGIST should not be changed to ORGANIZING THE ARCHEOLOGIST.

Also use alternative spellings when necessary to match the on-screen spelling of proper names and titles and to match the spelling preferences of performers such as k.d. lang (not K.D. LANG) whenever possible.

For more information about alternative spellings, see Explanatory Captions on page 22 and Inflections and Accents on page 23.

Spacing

1. Do not leave more than one space in a caption. A single space may be used after a period, colon, or semicolon as necessary.
2. It is common to leave a single space before and after music notes and parentheses.
3. There should not be a space between parentheses and the enclosed text.

Juta: (Singing rock song)

♪ I'M GOING TO GET YOU ♪

Text Attributes

Case

Upper case lettering is the standard in Canadian English language closed captioning. This will remain so until new standards can be developed for the proper use of mixed case, at which time it will likely replace upper case as the standard.

Captioned text is traditionally in upper case because all television encoders and decoders display it clearly. New encoders and decoders treat mixed case more legibly than in the past, and with this capability caption providers will be better able to follow standard English orthography in the future.

Currently, and for the purposes of this manual, upper case lettering is the norm. Mixed case is to be used for differentiation as described below.

1. To denote descriptions of non-speech information.

(Audience laughter)

2. To match on-screen case for proper names and titles where appropriate.

INES de la FRESSANGE

3. When necessary for clarity in reading.

MacDONALD

McDONALD

4. For e-mail and internet addresses.

www.cab-acr.ca

5. To denote speaker identification.

Mr. Gagnon:
GO AHEAD, DO IT!

Italics

In off-line captioning it is acceptable to use italics in the following ways. Real-time caption stenographers should substitute quotation marks for italics.

1. For emphasis.

OFF-LINE:

WE CALLED *THREE* TIMES!

REAL-TIME:

WE CALLED "THREE" TIMES!

2. For names of books, periodicals, films, television shows, short stories, poems, musical or dance works, names of records, videos, video games, works of art, and so on, but not for product or brand names.

WE SAW *GONE WITH THE WIND*
AGAIN LAST NIGHT.

I TOOK THE JEEP TO SHOPPERS
TO BUY SOME *TYLENOL*.

3. To indicate words from another language that have not been integrated into English.

WE BUY BREAD DAILY
FROM *LA BOULANGERIE*.

4. For disembodied voices.

Male Loudspeaker Voice:
*MR. AZOULAY, PLEASE COME
TO THE INFORMATION DESK.*

Colour

Captions usually appear as white text on a black background because this is a good combination for visibility. Colour captions can be difficult to discern against the video background.

Colour captions have been successfully used for special effects in music videos (not music segments within a program), and as an effect with certain voices in dramatic stories, but they have generally tested poorly both as an indication of speaker identification and as an indication of emphasis.^{viii} Colour captions can never be used as the sole indicator of who is speaking. Proper placement and speaker identification are always required.

Use of colour captions is discouraged until such time as research is conducted to develop proper guidelines for their use.

Flashing

Flashing captions have tested poorly as an indicator of audience reaction, laughter, and so on.^{ix} They can be distracting and thus do not contribute to readability or comprehension. Use of flashing captions is discouraged until such time as research is conducted to develop proper guidelines for their use.

Paint-on

Paint-on captions have tested poorly when used as music lyrics that paint on as they are sung. Use of paint-on captions is discouraged until such time as research is conducted to develop proper guidelines for their use.^x

Underlining

Underlining is rarely used. Caption consumers prefer italics for emphasis^{xi} and titles.^{xii} Use of underlining in captions is discouraged until such time as research is conducted to develop proper guidelines for its use.^{xiii}

Punctuation

The art of transcribing spontaneous speech for captions is very different from the creative process of writing dialogue. People involved in real conversations do not necessarily use grammatically correct sentence structure. They may use improper grammar, incomplete sentences, run-on sentences, slang, vernacular expressions, and so on.

An important challenge in captioning is to accurately represent imperfect verbatim speech, while providing text that is grammatically clean, so that it is quickly and easily understood by the audience, within the restricted time and space inherent in the medium.

When punctuating captions, the goal is always to follow correct English sentence structure and the conventions and standards of normal print media to the greatest extent possible; and while caption writers and caption stenographers should always avoid grammatically incorrect results, they may be unavoidable sometimes.

In the case of non-grammatical speech, punctuation cannot make it grammatically correct, so punctuation must, above all else, facilitate clarity and ease of reading. Therefore, caption writers and caption stenographers should observe the following rules.

- Keep punctuation minimal and clean.
- Do not string sentences together with commas, creating comma-spliced sentences that are difficult to read.
- Find places to break run-on speech into simple sentences of four lines or less.
- If necessary for clarity and ease of reading, captioned sentences may start with words such as OR, SO, AND, BUT, FOR, YET.
- Make use of Canadian dictionaries and style guides to reach sound decisions about punctuation.
- Document decisions and be consistent.

The following examples will clarify areas of particular concern for captioning.

Acronyms and Abbreviations

1. Because captions are usually in upper case letters, acronyms become easier to read if periods are applied.

THE C.E.O.
HAS MOVED TO P.E.I.

L.A. AND N.Y.C.
ARE BOTH BIG CITIES.

2. However, if an acronym is pronounced as a word, periods are not necessary unless the acronym could be mistaken for a spoken word.

HE COLLECTED MONEY
FOR NATO.

JOSE TOOK A CAB
TO THE C.A.B. CONVENTION.

3. Abbreviations such as DR. MS. MRS. and MR. require periods.

Dashes

1. Use a dash when one speaker cuts off another or when there is an abrupt change of thought.

i. I WENT
DOWN TO THE DOCKS--

ii. WHAT WAS THAT?

2. Use a dash at the beginning and end of parenthetical information that is too abrupt to be set off with commas.

i. PLEASE TAKE JOE--
HIS HAND STILL HURTS--

ii. OVER TO THE HOUSE
IMMEDIATELY.

Ellipses

Ellipses should be used sparingly, to indicate a trailing off of speech, an incomplete sentence, or a pause in speech. They must not be used at the end of one caption if no pause is present before the appearance of the next caption. Note that if the pause is more than three seconds in duration it is appropriate to blank between captions.

i. HE ARRIVED AROUND NOON...
(Three second blank)

ii. AT LEAST I THINK IT WAS NOON.

Hyphens

1. Follow standard grammatical use of hyphens.
2. Do not hyphenate words simply because they do not fit on a line. Instead, drop the whole word to the next line.

INCORRECT:

SUKI AND BOB WENT PARA-
SAILING IN CUBA AND JA-
MAICA.

CORRECT:

ROLL-UP EXAMPLE

>> SUKI AND BOB WENT
PARASAILING IN CUBA AND
JAMAICA.

POP-ON EXAMPLE

SUKI AND BOB
WENT PARASAILING

IN CUBA
AND JAMAICA.

3. Use hyphens when words are spelled out.

THE NAME'S SMYTH,
SPELLED S-M-Y-T-H.

Quotation Marks

1. Periods and commas are placed inside quotation marks without exception. Question marks and exclamation marks are set inside quotation marks if they pertain to the quotation itself and outside if they pertain to the overall sentence. Colons and semi-colons are always placed outside the quotation mark.
2. In pop-on captions, each new caption of quoted material should have beginning quotation marks, except for the last caption of the passage, which should have only ending quotation marks.^{xiv} When a passage from a book, play, or poem etc. is quoted, it should be captioned verbatim.

POP-ON EXAMPLE

- i. THEN HE SAID,
"YES, ROSA, MAMA CONTINUED
- ii. "UNTIL THE LAMPS
ALL WENT OUT,
- iii. BUT THERE WAS STILL
NO SIGN OF PEDRO."

3. In roll-up captions, it is only necessary to put quotation marks at the beginning and end of quoted passages.

ROLL-UP EXAMPLE

>> THEN HE SAID, "YES, ROSA,
MAMA CONTINUED UNTIL THE LAMPS
ALL WENT OUT, BUT THERE WAS STILL
NO SIGN OF PEDRO."

End Punctuation

1. Follow standard grammatical rules for end punctuation.
2. Use normal end punctuation for sentences that end with e-mail or internet addresses.

THE C.A.B. WEB SITE
IS www.cab-acr.ca.

3. Double end punctuation can be used for emphasis or to clarify inflection or emotion. This is the preferred method in real-time captioning when description on the fly is not practical. This method is used in off-line captioning when there is limited space and time for description.

YOU SAID THAT?!

YOU SAID THAT!!

Descriptive Captions: Non-Speech Information

Descriptive captions are those that represent the non-speech information in program audio. They are a useful tool for creating the mood, setting the scene, and establishing the context for dialogue. They are often used to describe music, background noises, and sound effects that are present in the audio track. They can also be used to convey speech inflections that are not animated in the video presentation, but which are central to the storyline. The effective use of descriptive captions is often what distinguishes exceptional captioning. Skilled caption writers and caption stenographers can use descriptive captions to significantly enhance a viewer's enjoyment and comprehension of a program.

The art of captioning involves making creative and informed choices about what to include in a caption script. Negotiating space and time limitations while simultaneously crafting the most accurate representation of the audio possible is a constant challenge, and while descriptive captions can do a great deal to enhance a viewer's understanding of a program, there are situations where their use is more appropriate than others.

Further, the same sounds can have different degrees of importance to a scene and should be judged and captioned accordingly. For example, a ringing telephone or wailing siren may be an important clue to what is about to

happen or may just be an incidental background noise that has no bearing on the plot. Sounds and descriptions that are absolutely central to story development or a viewer's understanding of dialogue must be included; at the same time, editing speech to make room for descriptive captions should be avoided.

The use of descriptive captions comes with this important caution: be careful not to create scripts that are too cluttered. Viewing television programming with captions and no audio requires more concentration than conventional viewing. Therefore, caption scripts should not bombard viewers incessantly with wordy or excessive descriptive information.

Hierarchy of Relevancy

To better use descriptive captions, caption writers and caption stenographers may employ "hierarchy of relevancy" as follows.

PRIMARY

Primary descriptive captions are absolutely crucial to the understanding of the audio or the story development. For example, a primary descriptive caption is required when a ringing phone interrupts a conversation in mid-sentence. It is important that caption viewers realize why the conversation was interrupted.

SECONDARY

Secondary descriptive captions are important, but not absolutely essential. They include adjectives or adverbs that describe a character's tone of voice. For example, the simple phrase "Thanks!" takes on different meanings depending on whether it is uttered with affection, sarcasm, or indifference. If space and time allow, if the mood is not obvious from the action on screen, and if the tone is important to the story or character development, then a description should be included to qualify the caption "Thanks!"

TERTIARY

Tertiary descriptive captions, the least frequently used, are only included if time and space permit. These captions often simply contain description of incidental sounds.

Examples

Descriptive captions appear inside parentheses and use normal mixed case. They should describe sound rather than action. The source of the sound must be identified if it is not obvious. Avoid onomatopoeia.

Use captions during subtitled passages to indicate and describe non-speech information as needed.

AMBIENT SOUND

(Phone ringing)

(Phone rings)

(Phone rings twice)

(Phone rings continuously)

(Phone stops ringing)

(Engine revving)

(Whispering)

(Loud knock)

(Loud knocking)

(Knocking stops)

(Knocking resumes)

(Rapid gunfire)

(Gunshot)

(Distant gunshots)

AUDIENCE REACTION

Audience reaction should be indicated when it enhances a joke or storyline. An exception is continuous laughter throughout a segment. In this case, indicating all occurrences would probably become an annoyance to the reader.^{xv}

(Applause and cheering)

(Audience laughter)

EMOTION

If relevant to the plot, a description may be used when emotion is strong but not conveyed by facial expression or context.^{xvi}

(Angrily)

LET GO!

EXPLANATORY CAPTIONS

1. Use an explanatory caption when sound is produced by an unusual source.

(Synthesizer sounds like
male voices clucking)

2. Unusual pronunciations should be explained if essential to the understanding of a storyline or joke.

OFF-LINE EXAMPLES

IT'S THE DITCH WATCHER.
("Dish washer")

I'VE GOT A RUNNY NOTHE ("Nose")

YOU SAY TOMATO ("Toe-may-toe")
AND I SAY TOMATO ("Toe-mah-toe").

REAL-TIME EXAMPLES

IT'S THE "DITCH WATCHER."

I'VE GOT A RUNNY "NOTHE."

YOU SAY "TOE-MAY-TOE"
AND I SAY "TOE-MAH-TOE."

3. If a character is thinking or dreaming words, an explanation is required.

(Jamal thinking)
*I KNOW YOU'RE
OUT THERE SOMEWHERE.*

4. Do not guess at indiscernible speech. Use an explanatory caption.

(Speaking Spanish)

(Indiscernible conversation)

(Angry shouting)

(Lyrics unclear)

(Unclear)

5. If speech is too fast for transcription, use an explanatory caption.

(Speaking exceptionally fast)

INFLECTIONS AND ACCENTS

It is necessary to communicate the meaning and intent of speech as clearly as possible, so that it is read as quickly and easily as possible. Therefore, correct spelling and punctuation are essential in captioning and should be upheld despite imperfections in people's speech. Many people speak with inflections or accents, use liaisons between words, or leave endings off words, etc. It is only appropriate to misspell words to convey these characteristics when absolutely essential to the understanding of a storyline or punchline. Over-use of misspelling detracts from clarity and reading ease, so it should be used sparingly and with great discretion.

1. If a person has an unusual way of speaking, do not describe or misspell words to reflect this unless a description or misspelling is absolutely essential to the understanding of their role or humour.

I 'M GONNA TELL MA
YER LEAVIN', YOU EGGHEAD!

2. In normal conversation, if a person speaks with an accent, do not describe the accent and do not misspell words to imitate the accent. Rather, type what they say as plainly as possible, editing as little as possible:

I 'M HAVE A GOOD DAY ALWAYS
BUT YESTERDAY NOT SO GOOD.

3. If a description or misspelling is absolutely essential to the understanding of the speaker's role or humour, misspelling or description is warranted.

>> YO, WASSUP?

>> (Speaking with a British accent)
I SAY, OLD CHAP!

MUSIC AND SONGS

1. A description should be given of all music, whether background or foreground, whenever time and space allow. A music description usually contains two elements: 1) pace or mood 2) genre or style.

('60s rock instrumental)

(Lively jazz music)

(Background music:
Romantic pop)

(Theme plays:
Upbeat pop)

2. Once described, if the music continues, use a single music note in one corner of the screen for the duration of the musical segment.



3. Song lyrics should be verbatim. They should be in upper case with a music note before and after each lyric, with a space between the music note and the text. Use normal punctuation in songs where phrasing requires it. Do not use end punctuation in lyrics, with the exception of question marks. For information about music with specific types of captions, see pages 40 (off-line roll-up captions) and page 44 (real-time captions).

♪ THE SUNSET IS RED, RED, RED
OVER WATER SO BLUE ♪

SILENCE

Normally, the absence of captions is enough to indicate silence or pauses. The following descriptions should be used only if the silence is so long that the viewer may wonder what has happened to the captions or if silence is used for dramatic effect.

(Long silence)

(Long pause)

(No voice)

(Mouthing words)

(No audio) generally used to denote a total loss of audio due to technical difficulties

(No mic audio) generally used to denote a total loss of microphone audio due to technical difficulties

Numbers

Follow the common rule of spelling out whole numbers nine and under. Use numerals for other whole numbers, with the following exception. If a sentence contains a series of numbers above and below ten, use numerals for all.

Use numerals for ages, automobile and plane makes and model numbers, betting odds, dates, dimensions, fractions, heights, highway designations, money, numerical abbreviations, page numbers, pars, recipes, Richter scale readings, scores, speeds, temperatures, times, weapon calibres, weights, and yardage.

Other cases are described below.

Approximate Values

Use words for approximate values.

THERE ARE SEVERAL HUNDRED.

IT SOLD FOR MILLIONS OF DOLLARS.

Dates

JULY 3, 1962	(if "July third" is said with the year)
JULY 3 rd	(if "July third" is said without the year)
THE '70s	(not THE 70's and not THE SEVENTIES)

Fractions

Use the $\frac{1}{2}$ and $\frac{1}{4}$ fraction characters only in combination with whole numbers.

BETWEEN 5 $\frac{1}{2}$ AND 6 $\frac{1}{4}$.

For other fractions, leave a space between the whole number and the fraction.

8 2/3

Measurement

Use numerals and fractions (not decimals) for measurement.

3 1/3 CUPS OF FLOUR

1 $\frac{1}{2}$ TABLESPOONS

Money

Do not use decimals and zeros in whole dollar amounts:

\$8 (not \$8.00)

Do use decimals for dollars and cents:

\$4.35

IT WAS \$29.99 AT THE DISCOUNT STORE.

For amounts in cents, use the cents sign:

20¢

For amounts in pounds sterling and Euros, use the same conventions as for dollar amounts:

£45	(not 45 POUNDS)
£8.45	(not EIGHT POUNDS FORTY-FIVE)
65.78 EUROS	

General Guidelines for Closed Captioning—Numbers

When captioning simultaneously with an on-screen graphic that uses different conventions from these, use those conventions if they are reasonable and will not lead to confusion.

ON SALE NOW AT \$.50

Music

Write out note values in full:

SIXTEENTH NOTE

EIGHTH NOTE

QUARTER NOTE

HALF NOTE

Expressions such as “four four time,” “three quarter time,” “two two time,” and “half time” should be written as follows:

4/4 TIME

3/4 TIME

2/2 TIME

HALF TIME

Ordinals

Use words for ordinals first to tenth. Use alphanumerics for higher ordinals, with no space between the number and lower case th, rd, or st.

FIRST

TENTH

999th

123rd

For the expression nth (to the nth degree), always write

nth

In specialized scientific discourse, fractions can be used in ordinals, for example, “the nine and a halfth interval.” In this case, use alphanumerics:

9½th interval

Roman Numerals

Use Roman numerals for world wars, Olympic Games, monarchs, popes, family dynasties, and product names where applicable.

WORLD WAR I

THE XXVI OLYMPIC GAMES

KING LOUIS XIV

POPE JOHN PAUL II

THURSTON HOWELL III

PENTIUM II

Percentages

Use numerals and the percentage sign for percentages:

10%

99.9%

Ranges

Use numerals in the format below for ranges of values such as “seven to eight hundred,” “between one and two million,” and “in the range of eighty to ninety cents a share.”

700 to 800

BETWEEN 1 MILLION AND 2 MILLION.

IN THE RANGE OF 80¢ TO 90¢
PER SHARE.

Telephone numbers

In telephone numbers, use hyphens between groups of numbers, but not between individual numbers:

1-800-123-1234

911

Time

Use words for fractions of time and numerals for the hour.

HALF PAST 4:00

(Not ½ PAST 4:00 and not ½
PAST FOUR)

QUARTER TO 6:00

(Not QUARTER TO SIX)

Guidelines for Pop-On Captions

Appropriate Use

Off-line pop-on captioning is appropriate for all types of programming. It is the only type of captioning that is well suited to dramas, sitcoms, movies, and music videos, and is therefore recommended for these types of programming.

It is also the preferred type of captioning for documentaries and children’s programming.

Timing Pop-on Captions

Every effort should be made to start and end pop-on captions with shot changes. That is, the in-time and out-time of each pop-on caption should occur in the first frame of a video shot so that captions appear in sync with video editing. This avoids the perceptual confusion that occurs when captions are out of sync with video editing.^{xvii} Note that while one pop-on caption is displaying, several shot changes may occur as long as the in-point and out-point of that caption coincide with the first frame of a shot change.

For example:

1. A shot begins. Even if the character does not begin speaking for a brief moment, the off-line caption writer should make use of lead-time by starting the character’s captions in the first frame of the shot, before speech begins.
2. Similarly, if a character stops talking just ahead of a shot change, the off-line caption writer should make use of lag time and extend the character’s caption to the first frame of the next shot.
3. If the character talks continuously through several quick shot changes, the caption writer may spread out a single caption as needed, covering several quick shot changes, as long as the caption begins and ends with the first frame of a shot change.
4. In the case where there is no clear shot change, but instead a slow transition such as a dissolve or wipe is used, captions are most effective if they change at the beginning of the transition. However, a long dissolve or wipe may have many overlapping frames, so the point of change is flexible according to the duration needed for a suitable presentation rate. For more information about presentation rate, see Presentation Rate Guidelines on page 30.

Exceptions

1. If absolutely necessary, when shots are very long in duration, captions may begin and end at any time, provided there is a sufficient presentation rate. For more information about presentation rate, see Presentation Rate Guidelines on page 30.

2. Every attempt must be made to structure pop-on captions according to the rules of division outlined under Caption Structure on page 34. In rare cases, a caption may begin or end away from a shot change if absolutely unavoidable in order to provide correct caption structure within the appropriate presentation rate.

Presentation Rate

Off-line caption writers should follow these presentation rate guidelines for pop-on captions:

- Allow a minimum of 1.5 seconds duration for each 32 characters of text.
- Allow a minimum of two seconds duration to display the last 32 characters of text before blanking or moving captions.
- Do not display any caption for less than one second.
- The maximum presentation rate should be three seconds duration for each 32 characters of text.

When Speech is Very Fast

When speaking, a person may put out 250 or more words per minute. In captioning, verbatim text at this rate can be technically difficult to display and virtually impossible to read. If captions are so fast that they are unreadable, they are self-defeating and unacceptable. What's more, reading captions is different from reading printed material, where text can be studied and reviewed at the reader's pace. A TV viewer gets only one chance to take in a caption while simultaneously following on-screen action, so word rate is extremely important.

A comfortable presentation rate for pop-on captions falls under 200 words per minute, which is also an acceptable reading pace for most adults. The presentation rate guidelines above accommodate this.

Closed captions should, to the greatest extent possible, be verbatim representations of speech. Speech should only be reduced as a last resort, when technical limitations or limitations of duration and space will not accommodate all of the spoken words at an appropriate presentation rate. Caption writers must use great discretion when reducing speech and follow these general rules:

- Always attempt to write verbatim speech.
- Always avoid rephrasing. Rather, remove only unnecessary words.
- Always match the complexity and meaning of all obvious speech and sound.^{xviii}
- Do not edit passages from religious scripture, literary passages, direct quotes, and so on.

EXAMPLES

1. VERBATIM:

HE BOUGHT A WRENCH
AND HE BOUGHT A HAMMER
AND A SCREWDRIVER
AND A DRILL.

EDITED CORRECTLY:

HE BOUGHT A WRENCH, A HAMMER,
A SCREWDRIVER, AND A DRILL.

EDITED INCORRECTLY:

HE BOUGHT
MANY HAND TOOLS.

2. VERBATIM: (FOUR CAPTIONS)

- i. WOULD YOU LIKE SOMETHING TO EAT?
- ii. NOTHING AT ALL, THANKS.
- iii. ARE YOU SURE?
- iv. YES, QUITE SURE.

EDITED CORRECTLY: (FOUR CAPTIONS)

- i. SOMETHING TO EAT?
- ii. NOTHING, THANKS.
- iii. SURE?
- iv. YES.

EDITED INCORRECTLY:

- i. WOULD YOU LIKE SOMETHING TO EAT?
- ii. NO THANKS.

4. VERBATIM:

THEY SAID THEY WERE GOING
TO THE COLLEGE.

THAT'S WHAT THEY SAID.
I BELIEVED THEM.

EDITED CORRECTLY: (TWO CAPTIONS)

i. THEY SAID THEY WERE GOING
 TO THE COLLEGE.

ii. I BELIEVED THEM.

EDITED INCORRECTLY:

I BELIEVE THEY WERE GOING
TO THE COLLEGE.

When Speech is Very Slow

If dialogue is exceptionally slow and there are long pauses, or if the shots are extremely long in duration, the caption writer may synchronize captions with speech and leave blanks between them, using ellipses where appropriate. For more information, see Ellipses on page 17. Indicate long pauses with a descriptive caption where appropriate. For more information, see Silence on page 24.

Caption Shape

1. A pop-on caption normally appears in a pyramid or inverted pyramid shape. The text is generally centred:

i. I CAME HERE TODAY
 BECAUSE I NEED YOUR HELP.

ii. THAT IS ALL I HAVE TO SAY
 FOR THE TIME BEING.

2. Two-line captions are the norm and are preferred over long, one-line captions.^{xix}

ACCEPTABLE:

SHE ALWAYS DROPS IN AROUND 2:00.

PREFERRED:

SHE ALWAYS DROPS IN
AROUND 2:00.

- 3.** One-line captions are recommended only when a sentence is very short:

IT'S OKAY.

- 4.** Three-line captions are generally avoided but may be used to avoid covering essential visual information or in dramatic work if placement is crucial for speaker identification. For more information, see Speaker Identification on page 36 and On-screen Information on page 12.

ACCEPTABLE:

HOW MANY YEARS
WERE YOU AWAY
FROM HOME?

PREFERRED:

HOW MANY YEARS
WERE YOU AWAY FROM HOME?

- 5.** Note the shape of the following caption. It is divided correctly according to grammar, but the appearance is awkward.

IT'S A VERY BIG HAT,
BUT I'LL PUT IT ON MY HEAD
JUST TO PLEASE YOU.

Although the above caption is acceptable, it is preferable to divide it into two easy-to-read captions.

- i. IT'S A
VERY BIG HAT,
- ii. BUT I'LL PUT IT ON MY HEAD
JUST TO PLEASE YOU.

- 6.** If time is short, the text may be edited to create a two-line caption:

IT'S A VERY BIG HAT.
I'LL PUT IT ON TO PLEASE YOU.

- 7.** If two sequential pop-on captions have the same shape and placement, a change of captions may not be detected.^{xx} It is therefore essential to

slightly vary the placement of sequential pop-on captions when their shapes are identical, while keeping them in the same area of the screen.

8. Very quick captions must be placed in the same area of the screen as immediately preceding captions. If the eye has to travel to a different part of the screen, either the caption or the video action will be missed.

Caption Structure

Captioning should follow the conventions and standards of normal print media to the greatest extent possible. But proper division is extremely important in pop-on captions because it makes the text easier to read quickly. Improperly divided text stops the reader so that he or she spends time re-reading instead of reading quickly and then scanning the picture.

1. Each new sentence should start a new caption.

INCORRECT:

- i. COME ON INSIDE.
 YOU'LL CATCH A COLD
- ii. IF YOU STAY OUT THERE!

CORRECT:

- i. COME ON INSIDE.
- ii. YOU'LL CATCH A COLD
 IF YOU STAY OUT THERE!

2. Where sentences are very long, they should be divided into several captions according to grammatical breaks and natural phrasing.

INCORRECT:

- i. THE BANK CLERK, WHO WAS
 ALSO A BOOKKEEPER, KEPT
- ii. BUSY WORKING TWO
 JOBS.

CORRECT:

- i. THE BANK CLERK,
 WHO WAS ALSO A BOOKKEEPER,

- ii. KEPT BUSY
WORKING TWO JOBS.

- 3.** If an article, preposition or conjunction begins a phrase, use it at the beginning of a new line or new caption.

INCORRECT:

HE GOT AWAY AND
WITH SEVERAL HUNDRED COINS!

CORRECT:

HE GOT AWAY
AND WITH SEVERAL HUNDRED COINS!

- 4.** Where appropriate, make one long sentence into two or more shorter captions following the same rules of division:

- i. WHEN HE CAME
TO THE DOOR

- ii. WITH YOUR SCARF
IN HAND

- iii. I DECIDED
TO LET HIM IN.

- 5.** Captions may also be divided so that descriptive or modifying words stay together with the words they describe or modify.

INCORRECT:

MIMA DECIDED TO WEAR HER
NEW RED COAT.

CORRECT:

MIMA DECIDED TO WEAR
HER NEW RED COAT.

- 6.** Two or more sentences may occur in one caption where the sentences are very short and there is not enough time to read separate captions.

GO FOR HELP!
WHAT ARE YOU WAITING FOR?!

Speaker Identification

When the Speaker is Obvious

When there are multiple speakers on screen, it is customary to place pop-on captions to help identify who is speaking.^{xxi} A person on the left would have left-placed captions; a person on the right would have right-placed captions; a person in the centre would have centre-placed captions, and so on. Centre justification is preferred in all caption positions. Left justification is acceptable. Do not use right justification in captions. Do not use chevrons (>>) in pop-on captions.

When the Speaker is Not Obvious

If it is not obvious who is speaking, when characters move around the screen, when faces are indistinct, when dialogue is very fast, or when the speaker is off screen or not visible, a speaker identification should be used.^{xii}

- Avoid editing speech to make room for speaker identification.
- Wherever possible, put the identification on a separate line.
- Three-line captions are allowed if space and time permit.
- Use mixed case and a colon for speaker identification.
- Combine the identification with a descriptive caption as needed for clarity.
- Use italics for disembodied voices with a speaker ID or description or both as needed.
- Indicate gender whenever possible in a speaker ID.
- Indicate age of speaker if relevant.

- i. Young Freda:
 VANILLA ICE CREAM
 IS MY FAVOURITE DESSERT.

- ii. Elderly Freda:
 VANILLA ICE CREAM
 IS MY FAVOURITE DESSERT.

- iii. Male Narrator:
 THE RAIN NEVER SEEMS TO STOP
 DURING THIS SEASON.

- iv. Female Announcer:
 LIVE, FROM THE BIG TOP,
 HERE IS OUR HOST, MAX BAX!

- v. Male Loudspeaker Voice:
 *MR. AZOULAY, PLEASE COME
 TO THE INFORMATION DESK.*

- vi. Radio Voice: (With loud static)
*NOW, ANOTHER HOUR
OF CONTINUOUS MUSIC.*
- vii. Rita: (From the closet)
GET ME OUT OF HERE!
- viii. Impersonating John Wayne:
HOWDY, PARTNER.
- ix. Together:
HIP, HIP, HOORAY!
- x. Both:
WE LOVE YOU!
- xi. Voice of Interpreter:
WE MUST WALK THREE MILES
FOR FRESH WATER.

Note: The terms “interpreter” and “translator” are not interchangeable. Always use “interpreter” in captioning. A translator deals only with written text.

Multiple Captions

Use multiple pop-on captions, displaying two or more captions simultaneously, only if the dialogue is very fast and there is insufficient time for each speaker to have a separate caption. Multiple captions must be clearly separated by space. Placement must be consistent with speaker position, and sentences must be short enough to be read quickly. Very quick captions must be placed in the same area of the screen as immediately preceding captions. If the eye has to travel to a different part of the screen, either the caption or the video action will be missed.

1. Multiple captions are appropriate for question and answer sequences.

DO YOU KNOW THE ANSWER
TO THE SKILL-TESTING QUESTION?

YES.

2. Use also where sentences are short.

- i. ARE YOU
BOTH THERE?

YES.

YES.

Guidelines for Pop-On Captions—Multiple Captions

- ii. WHERE?
 HERE!
 AND HERE!

- 3.** Use if many people are saying similar words all at once.

BYE! TA-TA!

BYE!

SEE YOU SOON!

- 4.** Use multiple captions over a program’s closing credits when it is necessary to display both caption credits and dialogue or music simultaneously.

Guidelines for Off-Line Roll-Up Captions

For the most part, guidelines for off-line pop-on captions apply to off-line roll-up captions. Only those guidelines and techniques that differ from pop-on are explained below.

Appropriate Use

If roll-up captions are used in the off-line situation, they should be verbatim.

Off-line roll-up captioning is not well suited to dramas, sitcoms, movies, music videos, or children's programs, and its use for these types of programming is discouraged.

Off-line roll-up captions are being used more and more frequently as an acceptable alternative to off-line pop-on captions. However, they are normally reserved for programs that have a live flavour such as entertainment, sports and news magazines, awards programs, and lifestyle programs. In many situations, off-line roll-up captions may be applied to other program styles; for example, when the speaking rate is extremely fast, verbatim roll-up captions may be preferable to highly edited pop-on captions. Or, when deadlines are extremely tight, roll-up captions can be prepared more quickly than pop-on captions.

Appearance

Off-line roll-up captions generally scroll in two- or three-line blocks at the bottom of the screen and are left justified with far left placement. However, if there are continual keys or graphics at the bottom of the screen, a two-line roll-up may be placed above the key area or at the top of the screen. Avoid covering characters' eyes when using top-of-screen captions. Two-line roll-up captions may also scroll anywhere on the screen as required to avoid covering other essential visual information. For more information, see On-screen Information on page 12.

If roll-up captions change placement, be sure that the last roll-up line in a segment has an appropriate presentation rate before blanking and changing position. For more information, see Timing Off-line Roll-up Captions on page 40.

In off-line roll-up captions, a new line is required for every new sentence and every new speaker. The words within a sentence simply wrap at the end of each 32-character line.

Each new speaker is indicated with a double chevron (>>), and when it is not clear to the viewer who is speaking, the name of the speaker should be indicated if known.

Example

>> Mary: HI ABDUL!
SORRY I'M LATE.
I WAITED AND WAITED FOR THE BUS
TODAY, AND AFTER ALL THAT, I HAD
TO STAND ALL THE WAY HERE!
>> Postman: EXCUSE ME, YOU ARE
BLOCKING THE SIDEWALK!
>> Mary: BOY, HE'S IN A HURRY!
>> Abdul: HE SURE IS!
(`60s rock song:
Piano introduction)
♪ HEY MR. POSTMAN,
LOOK AND SEE ♪
♪ IF THERE'S A LETTER,
A LETTER FOR ME ♪
♪ MR. POSTMAN ♪
(Song continues in background)
(Dog barking)
>> Abdul: THAT'S WHY HE'S IN
SUCH A HURRY!
FLUFFY IS AFTER HIM!

Timing Off-line Roll-up Captions

Where dialogue is particularly fast, captions should not be hurried; they should scroll evenly, using lag and lead time to accommodate an even pace. Roll-up captions overlap shot changes in order to maintain a consistent pace and an acceptable presentation rate.

Presentation Rate

Off-line caption writers should follow these presentation rate guidelines for roll-up captions:

- Allow an approximate duration of one second for each 32 characters of text.
- Allow a minimum of two seconds duration to display the last 32 characters of text before blanking or moving captions.
- Do not display any caption for less than 20 frames.
- The maximum presentation rate should be three seconds duration for each 32 characters of text.

Music and Sound

Music descriptions do roll up in roll-up captioned programs but follow pop-on rules of division.

(`60s rock song:
Piano introduction)

Pop-on captions must be applied during lengthy lyric passages, even within a roll-up captioned program. Lyrics can roll up on screen only when they are unusually fast or when there are just a few lines of singing interspersed with conversation. Roll-up lyrics should follow the same conventions as pop-on lyrics, so music notes must appear at the beginning and end of each lyrical phrase, not with each captioned line.

CORRECT:

♪ HEY, MR. POSTMAN,
LOOK AND SEE ♪
♪ IF THERE'S A LETTER,
A LETTER FOR ME ♪
♪ MR. POSTMAN ♪

INCORRECT:

♪ HEY, MR. POSTMAN, ♪
♪ LOOK AND SEE ♪
♪ IF THERE'S A LETTER, ♪
♪ A LETTER FOR ME ♪
♪ MR. POSTMAN ♪

Guidelines for On-Line Real-Time Captions

Real-time captioning should follow the conventions and standards of normal print media and of off-line captioning to the greatest extent possible.

Real-time captioning suppliers should adhere to specific guidelines so that there is continuity and consistency of style within every program, even when captioned by different caption stenographers.

Appropriate Use

Real-time captioning is the only method that enables the closed captioning of live news, sports, and other live events programming. For information about application to specific types of programming, see page 46.

Real-time captioning is not well suited to dramas, movies, sitcoms, music videos, children's programs, or documentaries, and its use for these types of programming is discouraged. However, in the rare situation that these types of programming are not available with captions when captions have been promised, and if there is no time to produce off-line or live-display captions, it is advisable to apply real-time captioning rather than to have no captions at all.

Presentation and Position of Captions

Ideally, real-time captions appear in a three-line roll-up format at the bottom of the screen. This allows the maximum presentation rate for ease of reading by viewers.

However, in many cases, to avoid covering graphics, keys, and other essential visual information, captions will have to be moved to another location and displayed in a two-line roll-up. When captions change positions, be sure that the last caption in a segment has at least a two-second duration before blanking and changing position.

Captions are limited to 32 characters per line of captions.

Every new sentence and every new speaker should begin on a new line for ease of reading.

Captions must be blanked off the screen prior to entering a television commercial frame, and the encoder must be put in pass mode so as not to interfere with post-production commercial captions.

Editing

In the case of real-time captioning, caption stenographers should strive for verbatim transcription.

There will be times, however, when due to the speed or density of material, verbatim captions may not be possible, and it will be necessary to omit words. Nevertheless, caption stenographers must endeavour to include all pertinent information and maintain the original meaning and flavour of what is being said.

Also, editing is sometimes necessary when names or terminology are not present in the caption stenographer's dictionary. But rather than editing out a name or term or changing it to a generic "he," "she," or "it," the captioning stenographer should endeavour to fingerspell the name or term the first time it occurs and then, if necessary, edit what follows to catch up.

VERBATIM: (spoken very quickly, without the word "Frusalis" in the caption stenographer's dictionary):

```
>> I TOLD MRS. FRUSALIS MANY,  
MANY TIMES THAT I REALLY DIDN'T  
THINK THAT IT WAS NECESSARY THAT  
HER HUSBAND, MR. FRUSALIS,  
CONTINUALLY PARK THEIR VEHICLE  
IN FRONT OF OUR ENTRANCEWAY.
```

EDITED CORRECTLY:

```
>> I TOLD MRS. FRUSALIS MANY  
TIMES THAT I REALLY DIDN'T  
THINK IT NECESSARY THAT HER  
HUSBAND CONTINUALLY PARK  
THEIR VEHICLE IN FRONT OF OUR  
ENTRANCE.
```

EDITED INCORRECTLY:

```
>> I TOLD HER MANY, MANY TIMES  
THAT I REALLY DIDN'T THINK IT  
WAS NECESSARY THAT HER HUSBAND  
CONTINUALLY PARK THEIR VEHICLE  
IN FRONT OF OUR ENTRANCEWAY.
```

Music

Lyrics should be written for all songs to the extent that the words are discernible. Music notes are necessary at the beginning and end of each lyrical phrase (not each new line of text) to indicate that the lines are being sung and not spoken.

For lyrics:

♪ THE ROLLING SEA
IS SO BLUE ♪
♪ I MISS THE SEA
AND I MISS YOU ♪

When lyrics cannot be discerned, a parenthetical description should be used. Whenever possible, a description is preferred to the parenthetical "(Music)":

(`60s rock instrumental)

For more information, see Music Shows on page 46.

Non-Speech Parenthetical Information

Captions must provide audio information beyond just the spoken word. Because of the fast pace of real-time captioning, the caption stenographer has only a split second to realize the need for a non-speech parenthetical and determine what that parenthetical should say. This can be extremely difficult to incorporate during live captioning.

Depending on the type of program being captioned, there are certain non-speech parentheticals that occur on a regular basis (i.e., instrumental music, applause, cheering, sirens) and these types of parentheticals should always be included. Whenever possible, the caption stenographer should also strive to incorporate other non-speech parenthetical information according to the guidelines for off-line captioning. For more information about descriptive captions, see Descriptive Captions: Non-Speech Information on page 19.

Parenthetical information should be in mixed case and enclosed in parentheses to distinguish it from spoken information. If parenthetical information is popped-on the screen, extreme care must be taken to allow sufficient time to read the previous roll-up captions.

Speaker Identification

A double chevron (>>) must be used to indicate each new speaker. When the name of the speaker is known, it should be included in mixed case followed by a colon. Guests and others are designated using first and last names. People commonly associated with a broadcast are generally designated using first names only.

>> Anne: GOOD EVENING.

In many instances, graphics containing speaker identifications are covered by real-time captioning. Caption stenographers must endeavour to insert these identifications into the captions whenever possible, depending on the speed and complexity of the broadcast.

Specific Programming

Awards Shows

Care must be taken not to cover the graphics and keys with captions. During full screen graphic presentations of nominees or winners, the captions can be cleared if the verbal information is redundant. Whenever possible, lyrics from musical performances should be obtained beforehand and live-displayed.

Music Shows

Care must be taken not to cover graphics and keys with captions. Whenever possible, lyrics should be obtained ahead of time and live-displayed. As much descriptive information as possible should be provided. It is not very helpful to viewers if a program specifically about music contains only “(Music)” parentheticals. For more information, see Music on page 44.

News and Talk Shows

Because of the fast pace and density of material, a three-line roll-up at the bottom is preferred whenever possible.

Sports

Sports events can be the most difficult programs to caption because the commentary is frequently too fast for verbatim transcription.

For very fast-moving sports such as hockey or football, the caption stenographer may opt not to caption all the play-by-play information (e.g., “Modin shoots the puck to Sundin and it’s cleared out to centre...”). But great care must be taken when using this approach. Caption stenographers cannot arbitrarily blank the screen during all play. Colour commentary and calls by officials must still be captioned, and often some play-by-play information must be included in order to provide context for the commentary and calls and to provide continuity in the captions. The caption stenographer must ensure that the viewer does not miss important information provided during play-by-play.

Care should also be taken in positioning different types of segments during a game or event. There must be consistency of placement so that the viewer can anticipate where captions will appear for different types of segments and types of play.

The captions should be positioned so as not to interfere with either the play or the graphics and keys. Care should be taken when repositioning so that captions are not being written as they are being moved. The last captioned line before blanking and changing positions must have a two-second duration.

Guidelines for On-Line Live-Display and Teleprompter Captions

Live-display and Teleprompter captioning should follow the conventions and standards of normal print media and of real-time captioning to the greatest extent possible. Captioning suppliers must endeavour to ensure that there is continuity and consistency of style within a particular program, even when captioned by different caption writers or caption stenographers.

Appropriate Use

Live-display

Live-display captions must be controlled and monitored by a trained person to ensure accurate playback and timing.

Off-line live-display captioning is often used for the repeat broadcast of a previously live program.

This method can also be used when the program itself is pre-recorded and the text is created ahead of time, but there is not enough time to produce off-line captions.

Other applications are discouraged.

Teleprompter

This type of captioning should only be applied to programs that are 100% scripted. It is the least acceptable method of captioning because it does not incorporate non-speech information. It is only appropriate when a script has been prepared and is available for an entire broadcast and when there is no ad-libbing or improvising.

Any other application is discouraged.

Appendix 1: Contributors

Closed Captioning Standards and Protocol for Canadian English Language Broadcasters was prepared by the Canadian Association of Broadcasters Joint Societal Issues Subcommittee on Closed Captioning Standards.

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Appendix 2: Major Milestones in Canadian Captioning History

- 2002**
 - The Canadian Association of Broadcasters creates *Closed Captioning Standards and Protocol for Canadian Broadcasters*, the first authoritative guide to Canadian English language closed captioning for television.
- 1998**
 - The Canadian Association of Broadcasters is honoured with its second “Special Recognition” Golden Cup Award in recognition of its work to ensure the closed captioning of news programming. Private broadcasters are commended for meeting the CRTC’s deadline for news captioning, despite some challenges, and for improving the quality and quantity of captioning in Canada.
- 1995**
 - In Public Notice CRTC 1995-48, the CRTC articulates its policy respecting closed captioning. As a result, “large stations” (earning more than \$10 million in annual advertising revenue and network payments) are required to
 - Caption local news programming, including live segments, by September 1, 1998
 - Caption at least 90% of all programming during the broadcast day by the end of individual licence terms
 Medium-sized stations (earning between \$5 and \$10 million) are “expected” to comply, and small stations (under \$5 million) are “encouraged” to meet these conditions.
 - *LOBCO*, in collaboration with Canadian broadcasters, plays a pivotal role in developing one of the first non-linear off-line captioning systems (*VoiceWriter*).
- 1996**
 - On behalf of private stations across Canada, the CAB accepts Canada Caption Inc.’s first “Special Recognition” Golden Cup award for the industry’s ongoing contribution to the captioning industry.
- 1993**
 - The Decoder Circuitry Act is passed in the United States. It legislates that all television sets 13” or greater must contain a built-in decoder chip. This increases awareness of and demand for captioning.
- 1992**
 - Canadian broadcasters begin securing sponsorship for closed captioned programming.
 - Canada Caption, Inc. (CCI) is formed to raise money to fund captioning in Canada.
- 1991**
 - Rogers initiates the TV SEE Decoder program as part of the benefits linked to the acquisition of Skyline Cablevision. In this \$2 billion initiative, complimentary decoders are provided to cable subscribers who need them, including people in households, hospitals, and schools. The program is designed to address the lack of decoders available to Deaf, deaf, deafened, and hard of hearing people.
- 1990**
 - The Canadian Caption Development Agency (CCDA), having outlived its usefulness, closes in the early 1990s. The captioners it trained leave to establish independent captioning agencies.

- 1985** • The first low cost captioning system (NewsCap) is created for the provision of live-display captioning of local programming at broadcast facilities.
- 1983** • The first World Conference on Captioning is held in Ottawa.
- 1982** • Both the CBC and Radio Canada air "Clown White," the first program captioned in Canada by the Canadian Caption Development Agency (CCDA).
 - CCDA creates the first dual-mode captioning system, which provides captions on both Line 21 and in the DOC/CBC/Telidon format.
- 1981** • The success of the Canadian Association of the Deaf's (CAD) Captioned Films and Telecommunications Program convinces the Department of Communication and the National Film Board to partner with the CAD to create the Canadian Captioning Development Agency. The CCDA is the first captioning agency in Canada, and for several years the only such agency.
- 1978** • Under the Department of Captioned Films and Telecommunications Program, The CAD hosts two captioning conferences in Canada and petitions the CRTC to direct the CBC to initiate captioning.
- 1977-79** • The Department of Captioned Films and Telecommunications Program activities include the CAD's successfully securing the allocation of Line 21 for captions.
The Program's largest activity is a multi-year distribution program through which it circulates captioned 35mm Hollywood films throughout the Deaf community in order to prove to the federal government that there is indeed a market for captioning.
- 1975** • The Department of Captioned Films and Telecommunications Program activities include the CAD's hosting of the first International Conference on Television and the Deaf in Washington.
- 1970** • Under Dr. E. Marshall Wick's leadership, the CAD is able to get funding support from the Department of Communications to begin the Captioned Films and Telecommunications Program in the early 1970s.
- 1969** • Dr. E. Marshall Wick, CAD President, and its first Executive Director, works full-time at Gallaudet University in Washington D.C. and is thus able to participate in closed captioning pioneering work being done in Boston, Mass., and bring the information to Canada.
 - As early as 1969, and in anticipation of the eventual success of experiments being conducted in Boston, CAD leaders lobby the federal government to establish a Canadian captioning institute.

Appendix 3: Skills and Qualifications of Off-line Caption Writers and On-line Caption Stenographers

- 1.** Excellent hearing, listening, and interpreting skills:
Caption writers and caption stenographers must have the power of concentration to listen intently for long periods of time and the skill to accurately interpret what they hear into written language.
- 2.** Excellent spelling, grammar, and punctuation skills:
Experience as a writer or copy editor is a definite asset.
- 3.** Excellent transcription and word processing skills:
 - a) Off-line: Above-average typing speed of 60 words per minute or more is advisable. Since transcription is a time consuming component of the captioning process, a faster typist will be a more productive caption writer.
 - b) Real-time: Above average stenotype skills of 225 words per minute or more, a clean steno theory, and a very well developed steno dictionary are necessary. The caption stenographer must be able to transcribe efficiently while under pressure to perform in a live situation.
- 4.** Ability to work independently, with good problem-solving and researching skills:
Both caption writers and caption stenographers must constantly make judgement calls about placement, timing, and spelling of captions. They must also be resourceful in researching unfamiliar topics on a daily basis.
- 5.** Organizational skills and the ability to meet deadlines while under stress and pressure:
Both caption writers and caption stenographers face rigid deadlines on a daily basis.
- 6.** Ability to troubleshoot technical difficulties and deal with video, audio, and computer equipment:
Both caption writers and caption stenographers must have the aptitude to operate a variety of equipment that they use daily. Some television production experience is a definite asset.
- 7.** Avid reader, particularly of newspapers and periodicals:
This will be helpful in recognizing and spelling names and terms in popular culture.
- 8.** Well-rounded education and knowledge in a wide range of disciplines:
Programs cover so many topics that familiarity with the subject matter is a great asset to transcription and stenography.
- 9.** Leadership skills:
Both caption writers and caption stenographers have to educate others about the captioning process and set up internal policies and guidelines with respect to captioning.
- 10.** Familiarity with the target audiences for their captions:
These include, but are not restricted to, the Deaf, deaf, deafened, and hard of

hearing communities. Familiarity with issues related to deafness and hearing loss is very advantageous.

11. Sound public relations skills:

Both caption writers and caption stenographers may be called upon to participate in community activities hosted by their target audiences, as well as promote their captioned programs to those audiences.

Appendix 4: Essential Vocabulary for Reference

The following is a list of the vocabulary that should be included in steno dictionaries for real-time caption stenographers and in reference materials for off-line caption writers.

Note that this is by no means a complete list but identifies only some basic essentials.

1. Thorough and extensive list of Canadian and U.S. place names.
2. Streets and landmarks and local celebrities for the city in which you caption.
3. Regional geography for the area surrounding the city in which you caption.
4. All past Canadian prime ministers and U.S. presidents.
5. Current Canadian premiers, federal opposition leaders, and cabinet ministers.
6. Current leaders of major countries.
7. Reasonably well known past premiers, opposition leaders, cabinet ministers, and leaders of foreign countries.
8. Provincial and municipal politicians in the region for which you caption.
9. Typical foreign words and phrases not routinely translated.
10. Famous athletes of today and of the past.
11. Common sports terminology in all major sports.
12. Well known people, places, and events from Canadian, American, and world history.
13. Well known terms, events, and people from the subjects of religion, language, and culture.
14. Well known terms and people from various subject matters including the following: anatomy, astronomy, anthropology, biology, chemistry, economics and business, genetics, mathematics, medicine, paleontology, pharmaceuticals, philosophy, physics.
15. Cultural terms from categories such as architecture, automobiles, brand names, decorating, fashion, food, media, and music.
16. Common terminology of all disciplines of the art, as well as famous practitioners of those disciplines.
17. Well known titles, stars, directors from film, theatre, and television, past and present.
18. Well known musical groups, artists, composers, and titles, past and present.
19. Music terminology, including styles and adjectives.

Appendix 4: Essential Vocabulary for Reference

20. Well known titles, authors, and characters from major literary works and cultural writings, past and present.
21. Weather terminology.

Glossary

American Sign Language	(ASL) A distinct, complex, linguistically complete language consisting of gestures, which is used by the Deaf community in English-speaking parts of Canada and many countries around the world.
broadcast day	A period of up to 18 consecutive hours of broadcast that is defined in a TV station's or network's operating licence; typically 6 a.m. to midnight.
captioned sub-master	The captioned videotape created during the encode process. It is identical to the edited master, except that it has closed captions present on line 21 of the vertical blanking interval, and the edited master does not.
crawl	Text, such as an emergency news update, that moves across the television screen in a horizontal scroll.
culturally Deaf	Members of the Deaf (upper case 'D') socio-linguistic and cultural group whose primary language is sign language.
data pulse	A single coded signal.
Deaf	A term that refers to members of a socio-linguistic and cultural group whose primary language is sign language. In English-speaking parts of Canada, the main sign language is American Sign Language (ASL).
deaf/ deafened	Terms that refer to individuals who have lost all or most functional hearing at some point in their lives. These people use spoken language and rely on visual forms of communication such as speechreading, text, and, in some cases, sign language.
dissolve	A transition between subsequent shots, whereby one image slowly fades out and the next image simultaneously fades in, overlapping during the process.
dub	A dub (noun) is a videotape duplicate of another videotape. To dub (verb) is to make a duplicate videotape copy of another videotape, whereby the master tape is played back, and the duplicate simultaneously recorded.
edited master	The videotape that contains the final edited version of a completed program. Used for playback during the process of encoding a captioned sub-master.
encode	The process of inserting caption data on line 21 of the vertical blanking interval.

Glossary

fingerspell	On the stenotype machine, to render a word letter by letter, usually because it is not contained in the caption stenographer's dictionary. Normally a word contained in the dictionary would be rendered phonetically by syllable.
frame store	A device used to store still video images that will be displayed during a broadcast.
hard of hearing	A term that refers to individuals who have a hearing loss ranging from mild to severe, although it is sometimes profound, and who use their voice and residual hearing and, in some cases, sign language for communication.
key	Text, such as people's names or program credits, that is superimposed on the television screen, becoming part of the picture.
line 21	The part of the vertical blanking interval that stores and transmits closed caption data.
non-speech information	Information given in captions that is not spoken, usually described sounds or music.
open captions	Captions that are permanently visible on a video image. They will be seen whether or not a decoder is in place during playback.
position code	Coded information that identifies a specific intersection of rows and columns on the television screen, represented by a set of four characters, and used for caption placement.
satellite feed	Video which is downloaded from a satellite signal, which may be broadcast simultaneously with downloading or recorded for broadcast later.
shot change	The frame where one video image meets the subsequent video image, often where one camera angle changes to another.
steno	Short for stenotype. The caption stenographers' shorthand, written on a special phonetic keyboard enabling them to write as quickly as a person speaks.
switcher	A device used to switch from one video source to another during a broadcast. Sources include live images, videotaped images, and special effect overlays.
Teleprompter	A device that displays the scrolling script read by an on-camera person, such as a news anchor or an award show host.
textual graphic	A stationary image consisting of text, which may take up all or part of the television screen.
time base corrector	A device used to stabilize video signals.

timecode	Coded numerical information that identifies each frame of video and is stored either in the vertical blanking interval or on an audio track.
timecode address	A set of eight numbers that identifies a video frame, which, when displayed, appears as hours, minutes, seconds, and frames. (e.g., 00:59:50:02) The numbers run in succession incrementally as the videotape plays.
vertical blanking interval	The area of the video picture signal that occurs between frames, consisting of 21 lines where coded information such as timecode and closed captions are stored.
video insert	A new video image that is inserted over, and replaces, an existing video image.
wipe	A transition between subsequent shots whereby one image seems to push another off the screen.

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