Attachment B: Cognitive Testing Protocol

**Reference Periods**

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| --- | --- | --- | --- |
|  | **Large (Salient) Items** | **Small (Less Salient) Items** | **Recurring Items** |
| **Group** | Airline Tickets  Coats, Jackets, or Furs  Televisions, all types  Automobile, truck, minivan, van or SUV  Washer and/or Dryer | Shirts, Blouses, or Tops  Camping Equipment  Power Tools  Pets, Pet Supplies, or Medicine for Pets  Photography | Mortgage or Rent  Electricity  Automobile or Other Vehicle Insurance  Mobile/Cellular Service  Accounting Fees, including Tax Preparation |
| **1** | 3 Months | 6 Months | 12 Months |
| **2** | 6 Months | 12 Months | 3 Months |
| **3** | 12 Months | 3 Months | 6 Months |

For each item participants will be asked:

* Since the first of [the reference month], have you or any members of your household purchased any (or had expenses for) [expenditure category]?
  + (if Yes) What was the cost of those items?
  + (if Yes) In what month did you purchase them?

After all questions have been asked for expenditure item, participants will be asked follow-up questions:

* I asked you about expenses for [expenditure category] since [the reference month] and you said “[repeat respondents answer, the expenditure amount, and the month of purchase]”
* Please explain how you arrived at your answer?
  + (if Yes) How confident are you that this expenditure occurred in the last [X] Months? (Not At All Confident – Extremely Confident)
    - (if Not At All or Extremely Confident) Why are you [Not At All/Extremely Confident]?
  + (if Yes) How confident are you that you accurately recalled the price of the item? (Not At All Confident – Extremely Confident)
    - (if Not At All or Extremely Confident) Why are you [Not At All/Extremely Confident]?
  + (if Yes) How confident are you that you purchased this item in [month]? (Not At All Confident – Extremely Confident)
    - (if Not At All or Extremely Confident) Why are you [Not At All/Extremely Confident]?
  + (if No) How confident are you that you *did not* purchase [expenditure category] in the last [X] Months? (Not At All Confident – Extremely Confident)
    - (if Not At All or Extremely Confident) Why are you [Not At All/Extremely Confident]?

For items with a 3 or 6 month reference period:

* Thinking back over the last 12 months, how many did you have for [expenditure category]?
* How accurately would you be able to report your purchases for [expenditure category] for a 12 month period? (Not At All Accurate – Extremely Accurate)

**Global Questions**

* Since the first of [the reference month], have you or any members of your household purchased, for you or your household or for someone outside of your household, any furniture?
  + (if Yes) What was the total cost of these items?
  + (if Yes) In what month did you purchase them?
* Since the first of [the reference month], have you or any members of your household purchased or rented any computer hardware, software, accessories, and service?
  + (if Yes) What was the total cost of these items?
  + (if Yes) In what month did you purchase them?
* Since the first of [the reference month], have you or any members of your household purchased any household linens or window coverings?
  + (if Yes) What was the total cost of these items?
  + (if Yes) In what month did you purchase them?
* **Furniture**
  + (if Purchased) What items did you purchase? What was the cost of each of those items?
  + What comes to mind when I say “furniture?”
  + [*Provide list of expenditure items*] Which of these items do you think definitely belongs in the category “furniture?”
  + Which of the items do you think definitely does not belong in the category “furniture?”
  + Did looking at that list remind you of any other things you’ve purchased since the first of [the reference month]?
    - (if Yes) What else did you purchase?
    - (if Yes) What was the cost of those items?
    - (if Yes) Why didn’t you include these items in your earlier answer about furniture? [Forgot about purchase, Didn’t think item would be considered furniture, etc.]
  + Did you think this question referred to the rental of furniture? Why or why not?
    - Have you rented any furniture since the first of [the reference month]?
  + Was the question about how much furniture you’ve purchased since the first of [the reference month] easy or difficult to answer?
    - What made it [easy/difficult] to answer?
  + [*Show current question item list*] Would you rather be asked if you’ve purchased furniture, in general, or about these different types of furniture separately? Which would be easier for you to talk about? Why?
* **Computer hardware, software, and accessories**
  + [if Purchased] What items did you purchase? What was the cost of those items?
  + What comes to mind when I say “computer hardware, software, accessories, and service?”
  + [Provide list of expenditure items] Which of these items do you think definitely belongs in the category “computer hardware, software, accessories, and service?”
  + Which of the items do you think definitely does not belong in the category “computer hardware, software, accessories, and service?”
  + Did looking at that list remind you of any other things you’ve purchased since the first of [the reference month]?
    - (if Yes) What else did you purchase?
    - (if Yes) What was the cost of those items?
    - (if Yes) Why didn’t you include these items in your earlier answer about computer hardware, software, accessories, and service? [Forgot about purchase, Didn’t think item would be considered part of this category, etc.]
  + Was the question about how much computer hardware, software, accessories, and service you’ve purchased since the first of [the reference month] easy or difficult to answer?
    - What made it [easy/difficult] to answer?
* [Show current question item list] Would you rather be asked if you’ve purchased computer hardware, software, accessories, and service, in general, or about these different categories of computer items separately?
* **Household Linens and Window Coverings**
  + [if Purchased] What items did you purchase? What was the cost of those items?
  + What comes to mind when I say “household linens or window coverings?”
  + [Provide list of expenditure items] Which of these items do you think definitely belongs in the category “household linens or window coverings?”
  + Which of the items do you think definitely does not belong in the category “household linens or window coverings?”
  + Did looking at that list remind you of any other things you’ve purchased since the first of [the reference month]?
    - (if Yes) What else did you purchase?
    - (if Yes) What was the cost of those items?
    - (if Yes) Why didn’t you include these items in your earlier answer about household linens or window coverings? [Forgot about purchase, Didn’t think item would be considered part of this category, etc.]
  + Was the question about how much household linens or window coverings you’ve purchased since the first of [the reference month] easy or difficult to answer?
    - What made it [easy/difficult] to answer?
* [Show current question item list] Would you rather be asked if you’ve purchased household linens or window coverings, in general, or about these different categories of computer items separately?