

Appendix A: Introduction

- Hi! Thank you for coming in today.
- I have a couple colleagues in the next room that will be observing and taking notes.
- Explanation of the study purpose:
 - Today we're going to be testing a part of the Consumer Expenditure survey. This survey collects information about how US households spend their money. We currently ask people to complete a paper diary to keep track of expenses, but with the increased use of smartphones, we want to give people the option of entering this information into their phones.
 - It's important to note that this is not a test of your ability. Our purpose today is to find out how easy or difficult it is to use the diary and to identify ways to improve it. Your feedback now can help make our future work more productive.
- Consent Form and permission to audiotape
- Any questions before we begin?

Getting Started

Enter the provided User ID and Password

You will be given the option to set a personalized password. Use a password that you can easily remember!

Tap on the **INFO** button to learn more about the CE Survey

Your scheduled start date can be found on the front of this pamphlet

Enter your e-mail address to receive reminders to add your expenses

This is your Home Screen

To add an expense, tap on **Add a new expense now**

After you've added an expense, you will see it listed here. At any point in the diary, you can tap on the **Home** button to return to this screen to see a summary of your entered expenses.

To view, edit, or delete any of your recorded expenses tap on **Edit** next to that expense.

	Date	Description	Cost
Edit	Oct 26	pasta dinner	\$52.76
Edit	Oct 26	drinks at bar	\$14.85
Edit	Oct 27	bus fare	\$1.25
Edit	Oct 27	scarf	\$21.99
Edit	Oct 27	shirt	\$34.99
Edit	Oct 27	chinese takeout	\$26.98
Edit	Oct 27	electric bill	\$120.89
Edit	Oct 28	bus fare	\$.125
Edit	Oct 28	dry cleaning	\$28.96
Edit	Oct 28	haircut	\$48.00
Edit	Oct 29	coffee	\$2.59

Food and Drink Away from Home

Select the date of the purchase: March 10, 2013

Enter the cost of the meal including tax: \$0.00

Select the category: Food and Drink Away from Home

Select the type of meal: Breakfast, Lunch, Dinner, Snack/Other

Select the type of vendor: [Dropdown]

Indicate if alcohol was included (mark all that apply): None, Wine, Beer, Other

Cost of Alcohol: \$0.00

Describe the meal. (e.g. coffee, buffet, drinks from cash bar, sandwich & chips)

Select the type of vendor

Enter the total cost of the alcohol

Food and Drink for Home Consumption

Select the date of the purchase: March 10, 2013

Enter the cost of the item without tax: \$0.00

Select the category: Food and Drink for Home Consumption

Select the type of packaging: Fresh, Frozen, Bottled/Canned, Other

Is this item: [Dropdown]

Describe the item. (e.g. whole milk, eggs, cereal, bananas, case of beer)

Select the category: Food and Drink for Home Consumption

Check if purchased for someone outside your household:

Clothing, Shoes, Jewelry, and Accessories

Select the date of the purchase: March 10, 2013

Enter the cost of the item without tax: \$0.00

Select the category: Clothing, Shoes, Jewelry, and Accessories

Select the gender for whom the item was purchased for: Male, Female

Select the age range for whom the item was purchased for: Under 2, 2-15, 16 & Over

Check if purchased for someone outside your household:

Describe the item. (e.g. jeans, soccer cleats, ring, baseball cap)

Select the category: Clothing, Shoes Jewelry, and Accessories

Check if purchased for someone outside your household

All Other Products and Services

Select the date of the purchase: March 10, 2013

Enter the cost of the item without tax: \$0.00

Select the category: All Other Products and Services

Check if purchased for someone outside your household:

Describe the item. (e.g. electric bill, dry cleaning, area rug, DVD, car insurance)

Select the category: All Other Products and Services

Check if purchased for someone outside your household

Appendix C: Screenshots of Mobile Diary

Login

CE Individual Diary

User ID:

Password:

Burden	Accessibility
Privacy	Security

OMB No.: 1220-0050
 Approval Expires: 4/30/2014

** WARNING **
 You have accessed a UNITED STATES GOVERNMENT computer. Use of this computer without authorization or for purposes for which authorization has not been extended is a violation of Federal law and can be punished with fines or imprisonment (PUBLIC LAW 99-474). System usage may be monitored, recorded, and subject to audit. Use of this system indicates consent to monitoring and recording.

Initial Setup

Logout **CE Individual Diary** INFO

Select the date you are scheduled to begin entering expenses:

Email address: (optional)

We will not share your email address with any 3rd parties. We ask for your email address only to send reminders regarding your participation in this survey.

Expense Summary

Logout **CE Individual Diary** INFO

Summary of Expenses
 You have no entered expenses.

Common Entry

Logout **CE Individual Diary** ?

Food Away From Home

Logout **CE Individual Diary** ?

Alcohol Included?

Cost of Alcohol:

Food At Home

Logout **CE Individual Diary** ?

Is this item:

Purchased for someone outside your household

Clothing

Logout CE Individual Diary ?

March 10, 2013

Enter Description

\$0.00

Clothing, Shoes, Jewelry, and Accessories

Was the item for:

Male Female

Age:

Under 2 2-15 16 & Over

Purchased for someone outside your household

Cancel Save

Other Expense

Logout CE Individual Diary ?

March 10, 2013

Enter Description

\$0.00

All Other Products and Services

Purchased for someone outside your household

Cancel Save

Appendix D: Interview Protocol

Diary Task Instructions

Now I'm going to ask you to complete a series of tasks using the diary. We are trying to simulate what it would be like for you to complete the diary. If you have any questions while we're going through, remember that there are materials here and help menus within the diary.

Do you have any questions before we begin?

Block A

1. Log In

Let's get started. First, I'd like you to use this Username and password to log into the diary...

<p style="text-align: center;">CE Mobile Diary</p> <p>Username: 948142</p>
--

2. Set Personalized Password

Next you will be given the option to set a personalized password. You will be logging into the diary several times, so you will want to use something you can remember. Please do not use a password that you use somewhere else, like your email. It's important that you don't forget the password since we can't quickly reset it, so do whatever you would normally do to keep track of a password.

3. Set Start Date

Next, you will see a screen asking you to select your start date. Please select October 21st as your start date. Below the start date, you will see that we ask for your e-mail address. You can skip that box. Please select the "Continue" button.

4. Enter Own Food Expense

Think back to the last food purchase you made. Please add that item to the diary as if the purchase was made on October 21st.

Log Out – *Once you've entered your expense, please log out.*

5. Enter Book for Friend, Enter Jeans for Self

On October 22nd, you go shopping and buy a book for a friend and a pair of jeans for yourself. Here are the receipts. Please enter these expenses into the diary.

Log Out – *Once you've entered your expense, please log out.*

7. Delete Pants

The next day, on the 23rd, you decide to return the pants that you had bought. Please go back and delete that item.

8. Change Book Details

You also decide that, rather than give the book to your friend, you are going to keep it for yourself. Please update that item to reflect that the book was purchased for you.

Log Out – *Once you've changed the information for that item, please log out.*

Block B

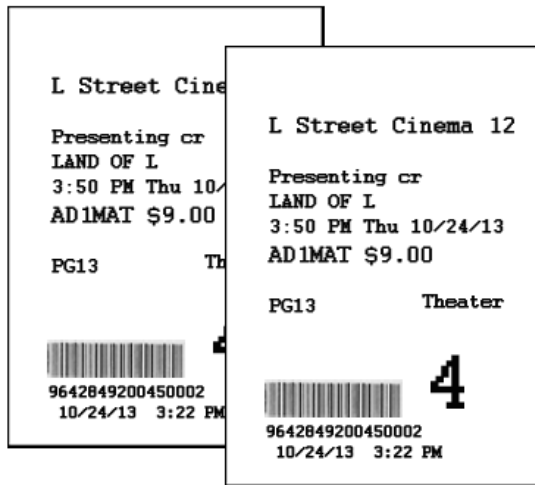
1. Enter Own Non-Food Purchase

Think back to the last purchase you made, other than food. Please add that item to the diary as if the purchase was made on October 23rd.


Log Out – *Once you've entered your expense, please log out.*

2. Enter Dinner, Enter Movie

On October 24th, you treat a friend to dinner and a movie and you pay for both. You decide to enter the purchases into the diary as you're waiting for the movie to begin. Here is your ticket stub and the receipt from dinner.



**Green Onion
Bistro**

Artichoke dip	8.00
Beef short rib ravioli	18.00
Ginger lemon chicken	16.00
Berry lemon pie	6.00
Chocolate pudding	6.00
Soda	3.00
Sweetened raspberry tea	4.00
Subtotal	61.00
Sales Tax	6.10
Total	67.10
Gratuity	<u>15.00</u>
Total	<u>82.10</u>
Signature:	
986 Divine Way Washington, DC 20964	

3. Enter Drinks

On the way home from the movie, you and your friend stop to get a couple drinks. Here is the receipt. Please enter this expense into the diary.

Log Out – *Once you’ve entered this expense, please log out.*

4. Edit Price of Drinks Purchase

The next day you realize that you had left a \$5 bill as a tip for the drinks you purchased, but forgot to enter that as part of the expense. Please change the entry to reflect the full price paid for the drinks.

H Street Lounge

0334 Table 8 #Party 2

Tracy L SvrChk: 45 22:47 10/24/13

1 LONG ISLAND ICE TEA	4.95
1 GIN	3.95
1 BLUE MOON	2.50

Sub Total: 11.40

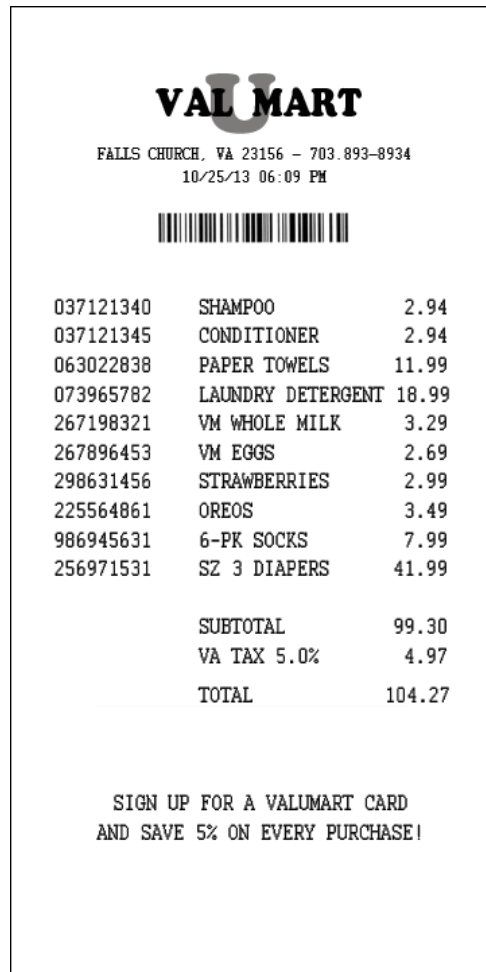
GST: 1.14

TOTAL: 12.54

THANK YOU!

5. Enter Long Receipt

On the 25th, you go to the Val-U-Mart superstore to buy a few things for your house – enter your expenses from this receipt.



Block C (if participant did not use buttons during testing)

I have a few additional questions for you about the diary.

1. Ask about INFO button

[Point to INFO button] *What do you think that this button does?*

2. Ask about HOME button

Please press the button to add an expense.

[Point to the HOME button] *What do you think that this button does?*

3. Ask about HELP button

[Point to the HELP button] *What do you think that this button does?*

(if help) What would you expect to find on the help screen?

Appendix E: Follow-up Questions

1. What did you think of the mobile diary?
2. Was it easy or difficult to use? Very Easy, Somewhat Easy, Neither Easy nor Difficult, Somewhat Difficult, Very Difficult
3. How confident did you feel in filling out the entries in the diary? Not at all Confident, A Little Confident, Somewhat Confident, Very Confident, Extremely Confident
4. How much training do you think the average person would need to get started on using the diary? None, A Little, A Moderate Amount, A Lot
5. Were there any tasks that you found particularly difficult?
6. Is there anything you would change to improve it?
 - a. Are there any functions or features that would make the mobile diary better or easier to use?
7. Imagine I came to your door and asked you to take part in a survey about what you spend money on. Would you be willing to use a mobile diary like this to keep track of your expenses?
 - a. How long would you be willing to use this mobile diary to keep track of your expenses?
 - b. Do you think you would need technical assistance?
 - c. Would you rather fill out a diary on a phone like this or on a computer? Why?
 - d. Would you rather fill out a diary on a phone or a paper diary? Why?

IF YES to 7 – indicates willingness to use the app

8. Imagine that you have agreed to keep track of your expenses for a week and you have the web diary on your phone.
 - a. When would you record your expenses? Check all that apply.
 - Right away, at the cash register
 - Right after I leave the store or make the payment
 - Whenever I have downtime throughout the day
 - At the end of the day
 - Whenever I have downtime throughout the week
 - At the end of the week
 - b. How would you record your expenses? Check all that apply.
 - Keep the receipts
 - Use the app when I don't have a receipt
 - Use the app when I only have one expense to enter
 - Make notes on paper to refer to later

- Make notes in another budget app to refer to later
- Use my memory to remember expenses

9. You had some experience with entering multiple items from a single receipt. How many items would you be willing to enter from a single receipt? _____

10. You logged into the web diary several times. What did you think of that experience?

Appendix F: Screening Questions

1. Do you own a smartphone or tablet?

IF UNSURE –

A smartphone is a phone on which you can easily access emails, download files and applications, as well as view websites and generally surf the internet. Popular brands of smartphone include iPhone, Blackberry, and Android phones such as the Samsung Galaxy.

A tablet is a device on which you can easily access emails, download files and applications, as well as view websites and generally surf the internet. The typical screen size of a tablet is larger than a smartphone. Popular brands of tablets include iPad, Kindle Fire, and Google Nexus.

- Yes (Go to Q2)
- No (Not eligible to participate)
- Don't know (Not eligible to participate)

2. Which operating system (OS) is on your device?

- iOS/Apple/iPhone/iPad
- Blackberry/RIM
- Android/Google
- Windows
- Palm
- Other
- Don't Know/Not Sure

3. (If Yes to Q1) How much experience do you have with using smartphones or tablets?

- None (Not eligible to participate)
- A Little
- A Moderate Amount
- A Lot

4. (If Yes to Q1) How much experience do you have with using applications or apps on smartphones or tablets?

- None (Not eligible to participate)
- A Little
- A Moderate Amount
- A Lot

