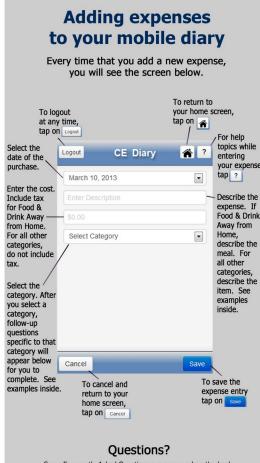
Appendix A: Introduction

- 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?

Appendix B: Placement Protocol and Pamphlet

Half of the participants will receive only the pamphlet. The other half will receive the pamphlet plus an explanation of the contents of the pamphlet and the basic data requirements of the diary.



Some Frequently Asked Questions are answered on the back of this pamphlet. If you still have questions after reviewing these, please call your field representative.

Frequently Asked Questions

1. What should I do if I forget my User ID or Password? Call your Field representative.

2. How detailed should my description be? For Food and Drinks Away from Home, briefly describe the meal. For all other expenses, briefly describe the individual item.

3. How can I delete or make changes to an expense that I've saved?

Go to the Home Screen and tap on the "Edit" button next to the item.

4. What should I do when I use coupons, discount cards, or loyalty cards? Enter the amount you paid, after any discounts.

5. How should I record multiple quantities?

If the items are identical, you can combine them in the same entry and enter the total cost of all the items.

6. How should I record pre-payments such as a subway fare card? Record the expense when you pay for it, not when you use it.

7. How should I record credit card purchases?

Record the individual expense on the day that you use your credit card to pay for something, not on the day you pay your entire credit card bill.

8. Can I just give you receipts instead of entering the expense? If you have a receipt with more than 10 items, you may give the receipt (or a copy of it) to your Field representative instead of entering the individual items.

9. What about gift certificates or gift cards?

If you buy a gift certificate to give to someone, enter it as a regular expense. If you buy something using a gift card, enter the full amount that you paid, including all payment methods.

10. What do I do about returns and exchanges?

If an item is bought and returned during the diary week, it can be selected on the Home Screen and deleted on the Edit Screen. If it was bought outside the week and returned during the week, do not make any entry. If an item is exchanged during the week, select the item on the Home Screen and make the necessary changes on the Edit Screen.

11. Should I record subsidized/reimbursed expenses?

Only record any extra amount that you or someone in your household paid. Do not record any amount that someone not in your household has or will pay for.



Your Daily Expenses



A quick guide to recording your expenses using the CE Mobile Diary

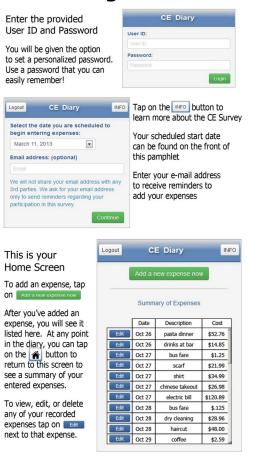
| Please record all of your expen | nses for the following period: |
|---------------------------------|--------------------------------|
| / / | // |
| start date | end date |

If you have any questions, please call:

| Field representative's name: | |
|------------------------------|--|
| Telephone: | |

Field representative supervisor's name:_____ Telephone:

Getting Started



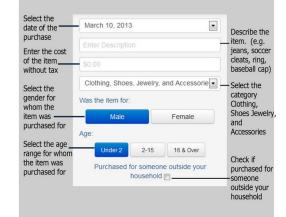
Food and Drink Away from Home

| Select the date of the —— purchase | March 10, 2013 | Describe the |
|--|-------------------------------|---|
| Enter the cost of the meal including tax | S0.00 | meal. (e.g. coffee, buffet, drinks from |
| Select the —— category | Food and Drink Away from Home | cash bar, sandwich & |
| Food and | Breakfast Lunch | chips) |
| Drink Away from Home | Dinner Snack/Other | Select the type of meal |
| | Select Type of Vendor | Select the type of vendor |
| Indicate if alcohol was | Alcohol Included? | |
| included | None Wine Beer Other | |
| (mark all that | Cost of Alcohol: | Enter the total |
| apply) | \$0.00 | cost of the alcohol |

Food and Drink for Home Consumption

| Select the date of the purchase | March 10, 2013 | T | Describe the item. (e.g. whole milk, —eqgs, cereal, |
|--|-------------------------------|---------------|--|
| Enter the cost of the item — without tax | \$0.00 | | bananas, case of beer) |
| without tax | Food and Drink for Hom | e Consumption | Select the category Food and Drin |
| Select the | | | for Home |
| type of | Fresh | Frozen | Consumption |
| packaging | Bottled/Canned | Other | Check if |
| | Purchased for some househo | | purchased for someone outside your household |

Clothing, Shoes, Jewelry, and Accessories



All Other Products and Services

| Select the date of the | March 10, 2013 | Describe the item. (e.g. |
|---|--|---|
| Enter the cost of the item without tax | S0.00 | electric bill, dry cleaning, area rug, DVD, car insurance) |
| Check if purchased for someone outside your household | All Other Products and Services Purchased for someone outside your household | Select the category All Other Products and Services |

Appendix C: Screenshots of Mobile Diary

Initial Setup Login **Expense Summary CE Individual Diary** CE Individual Diary Logout CE Individual Diary Logout INFO INFO User ID: Select the date you are scheduled to begin entering expenses: March 11, 2013 • Password: Summary of Expenses Email address: (optional) You have no entered expenses. We will not share your email address with any 3rd parties. We ask for your email address only to send reminders regarding your Burden Accessibility participation in this survey. Privacy Security ** WARNING ** 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. Food At Home **Common Entry Food Away From Home** Logout CE Individual Diary ? Logout CE Individual Diary ? **CE** Individual Diary ? Logout March 10, 2013 • March 10, 2013 • March 10, 2013 • Food and Drink Away from Home • Food and Drink for Home Consumption • Select Category Breakfast Lunch Is this item: Dinner Snack/Other Fresh Frozen Bottled/Canned Other Select Type of Vendor • Purchased for someone outside your Alcohol Included? household 📄 Wine Beer Other None Cost of Alcohol: Cancel Cancel Cancel Save

Clothing **Other Expense** Logout CE Individual Diary **CE Individual Diary** ? Logout ? March 10, 2013 • March 10, 2013 • • Clothing, Shoes, Jewelry, and Accessorie -All Other Products and Services Was the item for: Purchased for someone outside your household 📄 Male Female Age: Under 2 2-15 16 & Over Purchased for someone outside your household 📄 Cancel 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...

| CE Mobile Diary | |
|------------------------|--|
| Username: 948142 | |

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

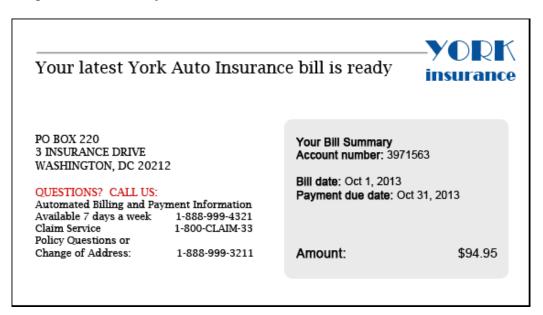
On October 22nd, you go shopping and buy a book for a friend and a pair of jeans for yourself. Here are the receipts. Please enter these expenses into the diary.

| | | Urban Cl vintage inspired | |
|--|-------|--|---------------|
| ATTIC BOOKSE | LLERS | CASHIER: Katelyn | REGISTER: 002 |
| Potomac Valley Shopping 2796 East Village D | rive | | |
| Potomac Valley, VA 2 | 2203 | Dark wash jeans | 49.00 |
| HARDCOVER BOOK | | SUBTOTAL | 49.00 |
| 099102735126 | 24.00 | SALES TAX | 2.45 |
| SUBTOTAL | 24.00 | TOTAL | 51.45 |
| 5% TAX | 1.20 | | |
| TOTAL | 25.20 | | |
| TOTAL PAYMENT | 25.20 | | |
| | | Trans: 51077 10/2 2700 Wilson Bo | |
| OCTOBER 22, 20 3:32 PM | 013 | Suite 99 Arlington, VA 703-494-6 | A 22201 |

Log Out – Once you've entered these expenses, please log out.

6. Enter Car Insurance Bill

Later on the 22^{*nd*}, you pay your car insurance bill online. This is the billing statement. Please enter this expense into the diary.



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

7. Delete Pants

The next day, on the 23^{*rd*}, *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 On Bistro | |
|--|---|---|--|
| | | Artichoke dip Beef short rib ravioli Ginger lemon chicken Berry lemon pie Chocolate pudding | 8.00 18.00 16.00 6.00 6.00 |
| L Street Cine Presenting cr LAND OF L 3:50 PM Thu 10/ AD1MAT \$9.00 PG13 Th | L Street Cinema 12 Presenting cr LAND OF L 3:50 PM Thu 10/24/13 AD1MAT \$9.00 | Soda Sweetened raspberry tea Subtotal Sales Tax Total Gratuity Total | 3.00 4.00 61.00 67.10 15.00 82.10 |
| 9642849200450002 10/24/13 3:22 PM | PG13 Theater 4 9642849200450002 10/24/13 3:22 PM | Signature: Angle Signature: 986 Divine W Washington, DC | |

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 Loung | ge |
|-----------------------|---------------|
| 0334 Table 8 #Party 2 | |
| Tracy L SvrChk: 45 23 | 2:47 10/24/13 |
| 1 LONG ISLAND ICE TEA | 4.95 |
| 1 GIN | 3.95 |
| 1 BLUE MOON | 2.50 |
| Sub 1 | Cotal: 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.

| V | ALMART | 1 |
|-----------|---|--------|
| FALLS CHU | RCH, VA 23156 - 703.89 10/25/13 06:09 PM | 3-8934 |
| II | | |
| | SHAMP00 | 2.94 |
| | CONDITIONER | 2.94 |
| | PAPER TOWELS | |
| 073965782 | LAUNDRY DETERGE | |
| 267198321 | VM WHOLE MILK | |
| 267896453 | | 2.69 |
| 298631456 | STRAWBERRIES | 2.99 |
| 225564861 | OREOS | 3.49 |
| 986945631 | 6-PK SOCKS | 7.99 |
| 256971531 | SZ 3 DIAPERS | 41.99 |
| | SUBTOTAL | 99.30 |
| | VA TAX 5.0% | 4.97 |
| | TOTAL | 104.27 |
| | JP FOR A VALUMART E 5% ON EVERY PUR | |

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.

- 0 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?
 - o iOS/Apple/iPhone/iPad
 - o Blackberry/RIM
 - o Android/Google
 - o Windows
 - o Palm
 - 0 Other
 - 0 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)
 - o A Little
 - o A Moderate Amount
 - o 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)
 - 0 A Little
 - 0 A Moderate Amount
 - o A Lot