# Consumer Expenditure CEQ Survey July 2016 Instrument Requirements

**SCIF changes**

| **CEQ Section** | **CEQ CAPI Variable** | **Change Detail** | **201502 Wording/Specification** | **201607 Wording/Specification** |
| --- | --- | --- | --- | --- |
| SCIF | QTYPE  **UPDATED 11/4/15** | Set all Interview 1 cases in interview periods 201607 through 201512 to one of 4 values (including blank) | QTYPE=Blank for all cases | For interview periods **201607, 201608, 201609, 201610, 201611, AND 201612**, DSMD should split all new interview 1 cases into 4 equal groups:  Blank = no incentive/normal interview  1 = $5 Token + $40 Advance Debit + $20 post-record debit  2 = NO Token + $40 Advance Debit + $20 post-record debit  3 = $5 Token + $40 Advance Debit + NO post-record debit  This flag should be copied to spawns and also carried forward throughout the case’s time in sample. |
| SCIF | New flag QTYPE2 | Create a new flag on the SCIF to be assigned to all 4th interviews in interview periods 201607 through 201609 | N/A – this flag did not previously exist | Create a new flag called QTYPE2.  For interview periods **201607, 201608, and 201609**, DSMD should split all 4th interviews (INTNMBR=4) into 2 equal groups and assign one of the following flags to each group:  1 = “last” question wording  2 = “most” question wording |
| SCIF | New flag PIN\_FLAG  **UPDATED 11/4/15** | Create a new flag on the SCIF to be assigned to 2nd interview cases for interview periods 201610 through 201703 | N/A – this flag did not previously exist | Create a new flag called PIN\_FLAG.  In post-processing for interview periods 201607 through 201612/in creating input files for interview periods 201610 through 201703, for cases with QTYPE not blank and an OUTCOME=201 in INTNMBR=1, set the following:  If QTYPE=1 OR 2 and R\_USE=1, set PIN\_FLAG=1 (completed debit card case with records)  If QTYPE=1 OR 2 and R\_USE ne 1, set PIN\_FLAG=2 (completed debit card case without records)  If QTYPE=3, set PIN\_FLAG=3 (completed debit card case not eligible for records debit)  This flag should NOT be copied to spawns *but* should be carried forward throughout the case’s time in sample. |

**FRONT changes**

| **CEQ Section** | **CEQ CAPI Variable** | **Change Detail** | **201502 Wording/Specification** | **201607 Wording/Specification** |
| --- | --- | --- | --- | --- |
| FRONT | GENINTRO | Update skip instructions for 1st interviews for the incentives test (changes in **RED**): | * Do not read as worded below   Identify yourself – show ID  ^Genintro  Introduce survey ^Genintro3  The Household address is  ^Rt20hno ^Rt20hnosuf ^Rt20strname  ^Rt20unitdes  Read if necessary:  I am (your name) from the US Census Bureau. Here is my identification card.  We are conducting a Consumer Expenditure Survey for the Bureau of Labor Statistics.  I have some questions I would like to ask you.  Did you receive our letter?   1. Yes 2. No   Skip instructions:  1: goto INTROB  2: goto GIVE\_LETTER  3: exit block and goto BCOVERAGE.NONTYP | * Do not read as worded below   Identify yourself – show ID  ^Genintro  Introduce survey ^Genintro3  The Household address is  ^Rt20hno ^Rt20hnosuf ^Rt20strname  ^Rt20unitdes  Read if necessary:  I am (your name) from the US Census Bureau. Here is my identification card.  We are conducting a Consumer Expenditure Survey for the Bureau of Labor Statistics.  I have some questions I would like to ask you.  Did you receive our letter?   1. Yes 2. No   Skip instructions:  1: **IF (INTNMBR=1 AND QTYPE=1, 2, or 3) goto RECVDEBT**  **ELSE** goto INTROB  2: goto GIVE\_LETTER  3: exit block and goto BCOVERAGE.NONTYP |
| FRONT | GIVE\_LETTER | Update skip instructions for 1st interviews for the incentives test (changes in **RED**): | * Hand the respondent the letter   Allow time to read   1. Enter 1 to continue   Skip instructions:  goto INTROB | * Hand the respondent the letter   Allow time to read   1. Enter 1 to continue   Skip instructions:  **IF (INTNMBR=1 AND QTYPE=1, 2, or 3) goto RECVDEBT**  **ELSE** goto INTROB |
| FRONT | New variable RECVDEBT | New variable for 1st interviews with QTYPE=1, 2, or 3. | n/a | [Fill1: **The letter you received should have included a debit card^Fill5, which is a token of appreciation from the Census Bureau for completing the interview.**’  [Fill2: **You should have also received a debit card^Fill5 as a token of appreciation from the Census Bureau for completing the interview.**]  [Fill3: **Did anyone living at this address receive the debit card?**]  [Fill4: **Did (READ NAMES) receive a debit card?**]  [Display roster for this CU]   1. Yes 2. No   Fill1 instructions:  If GENINTRO=1, fill Fill1 else leave blank.  Fill2 instructions:  If GIVE\_LETTER=1, fill Fill2 else leave blank.  Fill3 instructions:  If case is NOT a spawned CU, fill Fill3 else leave blank.  Fill4 instructions:  If case IS a spawned CU, fill Fill4 else leave blank.  Fill5 instructions:  If QTYPE=1 or 3 fill “ **and a five-dollar bill**” else leave blank.  Display roster fill instructions:  If case IS a spawned CU display roster; else leave blank.  Skip instructions:  1, REF: goto INTROB  2, DK: goto NOTRCV40 |
| FRONT | New variable NOTRCV40 | New variable asked if RECVDEBT=2 or DK | N/A | **I’m sorry that you did not receive the debit card. Upon completion of the interview, we will send you another card in the amount of $40 as soon as possible. If you also receive the original card we sent, please destroy it since we will be deactivating it.**   1. Enter 1 to continue   Skip instructions:  goto RCRDNM40 |
| FRONT | RCRDNM40 | New variable asked if RECVDEBT=2 or DK | N/A | **Who would you like the replacement card addressed to?**  Skip instructions:  100 characters, DK, REF: goto INTROB |

**CEINTRO changes**

| **CEQ Section** | **CEQ CAPI Variable** | **Change Detail** | **201502 Wording/Specification** | **201607 Wording/Specification** |
| --- | --- | --- | --- | --- |
| CEINTRO | BCEINTRO  **UPDATED 11/4/15** | Update block instructions to incorporate questions to be asked of returning cases flagged for the incentives test in interview 2 prior to the CEINTRO question | **Universe:** (BAdmin.ExitInterview <> 1) AND (BAdmin.ReplaceSpawn <> 1) AND (BFront.Start= 1 or 2) AND (BFront.INTROB ne 2-6) | **Universe:** (BAdmin.ExitInterview <> 1) AND (BAdmin.ReplaceSpawn <> 1) AND (BFront.Start= 1 or 2) AND (BFront.INTROB ne 2-6)  **Block instructions:** IF (INTNMBR=2 AND PIN\_FLAG=1, 2 or 3) goto DEBT40  ELSE goto CEINTRO |
| CEINTRO | DEBT40 | New variable asked of 2ND interviews with PIN\_FLAG=1, 2, or 3 | N/A | **After completing the last interview in ^REF\_MONTH, we gave you the PIN for a $40 debit card. Did you have any problems using that card?**   * Enter all that apply, separate with commas  1. No problems 2. Have not received the card 3. Have not used the card 4. ATM did not accept the debit card 5. Store did not accept the debit card 6. Forgot PIN 7. PIN did not work 8. Instructions were not clear 9. Instructions were lost 10. Lost or misplaced debit card 11. Other – specify 12. Don’t know   Skip instructions:  0-2, 9: IF 0, 1, 2, or 9 is selected with any other answer list option then goto CK\_DEBT40  ELSEIF PIN\_FLAG=1 goto DEBT20  ELSE goto CE\_INTRO  3-8, 10-11: IF 10 is selected goto DEBT40SP  ELSEIF PIN\_TYPE=1 goto DEBT20  ELSE goto CE\_INTRO  REF: IF PIN\_TYPE=1 goto DEBT20  ELSE goto CE\_INTRO |
| CEINTRO | DEBT40SP | New variable | N/A | * Specify:   Skip instructions:  IF PIN\_TYPE=1 goto DEBT20  ELSE goto CE\_INTRO |
| CEINTRO | DEBT20 | New variable asked if INTNMBR=2 and PIN\_FLAG=1 | N/A | **After the last interview in ^REF\_MONTH, we sent you a debit card for $20. Did you have any problems using the card?**   * Enter all that apply, separate with commas  1. No problems 2. Have not received the card 3. Have not used the card 4. ATM did not accept the debit card 5. Store did not accept the debit card 6. Forgot PIN 7. PIN did not work 8. Instructions were not clear 9. Instructions were lost 10. Lost or misplaced debit card 11. Other – specify 12. Don’t know   Skip instructions:  0-2, 9: IF 0, 1, 2, or 9 is selected with any other answer list option then goto CK\_DEBT40  ELSEIF 1 or 9 is selected goto NOTRCV20  ELSE goto CE\_INTRO  3-8, 10-11: IF 10 is selected goto DEBT20SP  ELSE goto CE\_INTRO  REF: goto CE\_INTRO |
| CEINTRO | DEBT20SP | New variable asked if DEBT20=10 | N/A | * Specify:   Skip instructions:  goto CE\_INTRO |
| CEINTRO | New variable NOTRCV20 | New variable asked if DEBT20=1 or 9 | N/A | **I’m sorry that [fill1: you have not received the card/the original debit card we sent you was misplaced]. We will send you a replacement card in the amount of $20 as soon as possible. If the original card [fill2: arrives/is found], please destroy it since we will be deactivating it.**   1. Enter 1 to continue   Fill1 instructions:  If DEBT20=1 fill “**you have not received the card**”  If DEBT20=9 fill “**the original debit card we sent you was misplaced**”  Fill2 instructions:  If DEBT20=1 fill “**arrives**“  If DEBT20=9 fill “**is found**”  Skip instructions:  goto RCRDNM20 |
| CEINTRO | RCRDNM20 | New variable asked if DEBT20=1 or 9 | N/A | **Who would you like the replacement card addressed to?**  Skip instructions:  100 characters, DK, REF: goto CEINTRO |
| CEINTRO | CE\_INTRO | Add fill for incentive test cases receiving debit cards (changes in **red**) | **As we start, please understand that we ask the same topics of everybody we talk to. I realize some of these questions may not apply to your household.**  **Most questions that I will be asking refer to a specific time period.**  **During this interview, the time period, unless I state otherwise is for the past three months, that is, from the 1st day of ^REF\_MONTH to today.**  **Most of my questions are about expenses your household had or bills you’ve received. You will find it helpful to have your checkbook register, credit card statements, and other records as you answer the questions.**   1. Enter 1 to continue   Skip instructions:  goto BUSCREEN | **As we start, please understand that we ask the same topics of everybody we talk to. I realize some of these questions may not apply to your household.**  **Most questions that I will be asking refer to a specific time period.**  **During this interview, the time period, unless I state otherwise is for the past three months, that is, from the 1st day of ^REF\_MONTH to today.**  **Most of my questions are about expenses your household had or bills you’ve received. You will find it helpful to have your checkbook register, credit card statements, and other records as you answer the questions.**  **^Debit**   1. Enter 1 to continue   **Debit fill instructions:**  If (INTNMBR=2 AND PIN\_FLAG=1,2, or 3) fill “**Please do not include any purchases made with the debit ^CARDS we have sent you.**”  **CARDS fill instructions:**  If INTNMBR=2 and PIN\_FLAG=1, fill “**cards**” else fill “**card**”  Skip instructions:  goto BUSCREEN |

**Section 4C changes**

| **CEQ Section** | **CEQ CAPI Variable** | **Change Detail** | **201502 Wording/Specification** | **201607 Wording/Specification** |
| --- | --- | --- | --- | --- |
| 4C | INTDESC | Update skip instructions for outlet test questions for 4th interviews in interview periods 201607 through 201609 (changes in **red**) | **What was the expense for?**  Skip instructions:  goto INTMO | **What was the expense for?**  Skip instructions:  **If (INTNMBR=4 AND UTI\_ITEM=3 AND INTPER=201607, 201608, or 201609) goto INTCOMP**  **ELSE** goto INTMO |
| 4C | INTCOMP | New question for 4th interviews in interview periods 201607 through 201609 if UTI\_ITEM=3 | N/A | * Ask if not apparent:   **What is the name of the company providing the internet service?**  Skip instructions:  30 characters, DK, REF: goto INTMO |

**Section 6B changes**

| **CEQ Section** | **CEQ CAPI Variable** | **Change Detail** | **201502 Wording/Specification** | **201607 Wording/Specification** |
| --- | --- | --- | --- | --- |
| 6B | INSTLSCR | Update skip instructions to account for outlet test questions when INTNMBR=4, ITEM=21, and INTPER= 201607, 201608, or 201609 (changes in **red**) | **Were there any additional charges for installation or set-up?**   1. Yes 2. No   Skip instructions:  1: goto INSTLLEX  2, DK, REF: goto MORE | **Were there any additional charges for installation or set-up?**   1. Yes 2. No   Skip instructions:  1: goto INSTLLEX  2, DK, REF: **If (ITEM=21 AND INTNMBR=4 AND INTPER=201607, 201608, or 201609) goto TVSTORE**  **ELSE** goto MORE |
| 6B | INSTLLEX | Update skip instructions to account for outlet test questions when INTNMBR=4, ITEM=21, and INTPER= 201607, 201608, or 201609 (changes in **red**) | **How much?**  Skip instructions:  1-99999: If INSTLLEX lt 40 or gt 1000 then goto ERR1\_INSTLLEX ELSE goto MORE  DK, REF: goto MORE | **How much?**  Skip instructions:  1-99999: If INSTLLEX lt 40 or gt 1000 then goto ERR1\_INSTLLEX ELSE **If (ITEM=21 AND INTNMBR=4 AND INTPER=201607, 201608, or 201609) goto TVSTORE**  **ELSE** goto MORE  DK, REF: **If (ITEM=21 AND INTNMBR=4 AND INTPER=201607, 201608, or 201609) goto TVSTORE**  **ELSE** goto MORE |
| 6B | TVSTORE | New variable asked of 4th interviews in interview periods 201607, 201608, and 201609 for ITEM=21 | N/A | **Where did you purchase this television?**   * Enter store, website, or company name. If purchased from a private individual, enter “private individual.”   Store instructions:  If ENTRY ends with “.com”, “.Com”, “.cOm”, “.coM”, “.COm", “.CoM”, “.cOM”, or “.COM”, then set TVPURCH=1  Skip instructions:  30 characters: if ENTRY ends with “.com”, “.Com”, “.cOm”, “.coM”, “.COm", “.CoM”, “.cOM”, or “.COM”, then goto MORE  ELSE goto TVPURCH  DK, REF: goto MORE |
| 6B | TVPURCH | New variable asked of 4th interviews in interview periods 201607, 201608, and 201609 for ITEM=21 if text entry does not end in some variation of “.com” | N/A | * Ask if not apparent:   **Was this purchased online or in-person?**   1. Online 2. In person   Skip instructions:  1, DK, REF: goto MORE  2: goto TVPURLOC |
| 6B | TVPURLOC | New variable asked if TVPURCH=2 | N/A | **Where is [fill: TVSTORE] located?**   * Enter city and state   TVSTORE fill instructions:  Fill entry from TVSTORE  Skip instructions:  200 characters, DK, REF: goto MORE |

**Section 9A changes**

| **CEQ Section** | **CEQ CAPI Variable** | **Change Detail** | **201502 Wording/Specification** | **201607 Wording/Specification** |
| --- | --- | --- | --- | --- |
| 9A | CLOCMBA\_S | Update skip instructions to account for outlet test questions when INTNMBR=4, CLA\_ITEM=110 or 120, and INTPER= 201607, 201608, or 201609 (changes in **red**) | * Enter ‘C’ for a combined expense   Skip instructions:  C: goto COMBCODE  EMPTY: goto MORE | * Enter ‘C’ for a combined expense   Skip instructions:  C: goto COMBCODE  EMPTY: **If (INTNMBR=4 AND (CLA\_ITEM=110 or 120) AND (INTPER=201607, 201608, or 201609) goto CLASTORE**  **ELSE** goto MORE |
| 9A | CLOCMBA | Update skip instructions to account for outlet test questions when INTNMBR=4, CLA\_ITEM=110 or 120, and INTPER= 201607, 201608, or 201609 (changes in **red**) | **What other clothing is ^CLODESCA combined with?**   * Enter all that apply, separate with commas.  1. Coats, jackets, or furs 2. Sport coats, tailored jackets, or blazers 3. Suits 4. Vests 5. Shirts, sweaters, blouses, or tops 6. Pants, jeans, or shorts 7. Dresses 8. Skirts 9. Undergarments 10. Hosiery 11. Nightwear or loungewear 12. Accessories 13. Swimsuits or warm-up or ski suits 14. Uniforms, for which the cost is not reimbursed 15. Costumes 16. Footwear, including athletic footwear 17. Diapers 18. Layettes 19. Watches 20. Jewelry 21. Misc. combined (unable to specify/DK)   Skip instructions:  goto MORE | **What other clothing is ^CLODESCA combined with?**   * Enter all that apply, separate with commas.  1. Coats, jackets, or furs 2. Sport coats, tailored jackets, or blazers 3. Suits 4. Vests 5. Shirts, sweaters, blouses, or tops 6. Pants, jeans, or shorts 7. Dresses 8. Skirts 9. Undergarments 10. Hosiery 11. Nightwear or loungewear 12. Accessories 13. Swimsuits or warm-up or ski suits 14. Uniforms, for which the cost is not reimbursed 15. Costumes 16. Footwear, including athletic footwear 17. Diapers 18. Layettes 19. Watches 20. Jewelry 21. Misc. combined (unable to specify/DK)   Skip instructions:  **If (INTNMBR=4 AND (CLA\_ITEM=110 or 120) AND (INTPER=201607, 201608, or 201609) goto CLASTORE**  **ELSE** goto MORE |
| 9A | CLASTORE | New variable asked of 4th interviews in interview periods 201607, 201608, and 201609 for CLA\_ITEM=110 or 120 | N/A | **Where did you purchase this ^CLODESCA?**   * Enter store, website, or company name. If purchased from a private individual, enter “private individual.”   Store instructions:  If ENTRY ends with “.com”, “.Com”, “.cOm”, “.coM”, “.COm", “.CoM”, “.cOM”, or “.COM”, then set CLAPURCH=1  Skip instructions:  30 characters: if ENTRY ends with “.com”, “.Com”, “.cOm”, “.coM”, “.COm", “.CoM”, “.cOM”, or “.COM”, then goto MORE  ELSE goto CLAPURCH  DK, REF: goto MORE |
| 9A | CLAPURCH | New variable asked of 4th interviews in interview periods 201607, 201608, and 201609 for CLA\_ITEM=110 or 120 if text entry does not end in some variation of “.com” | N/A | * Ask if not apparent:   **Was this purchased online or in-person?**   1. Online 2. In person   Skip instructions:  1, DK, REF: goto MORE  2: goto CLPURLOC |
| 9A | CLPURLOC | New variable asked if CLAPURCH=2 | N/A | **Where is [fill: CLASTORE] located?**   * Enter city and state   CLASTORE fill instructions:  Fill entry from CLASTORE  Skip instructions:  200 characters, DK, REF: goto MORE |

**Section 12C changes**

| **CEQ Section** | **CEQ CAPI Variable** | **Change Detail** | **201502 Wording/Specification** | **201607 Wording/Specification** |
| --- | --- | --- | --- | --- |
| 12C | VOPDIES | Update skip instructions to account for outlet test questions when INTNMBR=4 and INTPER= 201607, 201608, or 201609 (changes in **red**) | **Was any of this expense for diesel fuel?**   1. Yes 2. No   Skip instructions:  1: goto VOPDIESX  2, DK, RF: If BCEINTRO.BUSCREEN=2 goto VOPOIL ELSE goto VOPBSNS | **Was any of this expense for diesel fuel?**   1. Yes 2. No   Skip instructions:  1: goto VOPDIESX  2, DK, RFIf BCEINTRO.BUSCREEN=2 **AND (INTNMBR=4 AND INTPER=201607, 201608, or 201609) goto GASLOC**  **ELSEIF BCEINTRO.BUSCREEN=2** goto VOPOIL  ELSE goto VOPBSNS |
| 12C | VOPDIESX | Update skip instructions to account for outlet test questions when INTNMBR=4 and INTPER= 201607, 201608, or 201609 (changes in **red**) | **How much?**  Skip instructions:  1-9999: IF (VOPDIESX lt 5 or gt 400) then goto ERR1\_VOPDIESX  ELSEIF (VOPDIESX gt VOPGASX) then goto CK\_VOPDIESX  ELSEIF BCEINTRO.BUSCREEN=2 then goto VOPOIL  ELSE goto VOPBSNS  DK, RF: IF BCEINTRO.BUSCREEN=2 then goto VOPOIL  ELSE goto VOPBSNS | **How much?**  Skip instructions:  1-9999: IF (VOPDIESX lt 5 or gt 400) then goto ERR1\_VOPDIESX  ELSEIF (VOPDIESX gt VOPGASX) then goto CK\_VOPDIESX  ELSEIF BCEINTRO.BUSCREEN=2 **AND (INTNMBR=4 AND INTPER=201607, 201608, or 201609) goto GASLOC**  **ELSEIF BCEINTRO.BUSCREEN=2** then goto VOPOIL  ELSE goto VOPBSNS  DK, RF: IF BCEINTRO.BUSCREEN=2 **AND (INTNMBR=4 AND INTPER=201607, 201608, or 201609) goto GASLOC**  **ELSEIF BCEINTRO.BUSCREEN=2** then goto VOPOIL  ELSE goto VOPBSNS |
| 12C | VOPBSNS | Update skip instructions to account for outlet test questions when INTNMBR=4 and INTPER= 201607, 201608, or 201609 (changes in **red**) | **Was any of the AVERAGE MONTHLY cost counted as a business expense?**   1. Yes 2. No   Skip instructions:  1: goto VOPBSPER  2, DK, REF: goto VOPOIL | **Was any of the AVERAGE MONTHLY cost counted as a business expense?**   1. Yes 2. No   Skip instructions:  1: goto VOPBSPER  2, DK, REF: **IF (INTNMBR=4 AND INTPER=201607, 201608, or 201609) goto GASLOC**  **ELSE** goto VOPOIL |
| 12C | VOPBSPER | Update skip instructions to account for outlet test questions when INTNMBR=4 and INTPER= 201607, 201608, or 201609 (changes in **red**) | **What percentage of the AVERAGE MONTHLY COST was counted as a business expense?**  Skip instructions:  1-99, DK, RF: goto VOPOIL  100: goto ERR2\_VOPBSPER | **What percentage of the AVERAGE MONTHLY COST was counted as a business expense?**  Skip instructions:  1-99, DK, RF: **IF (INTNMBR=4 AND INTPER=201607, 201608, or 201609) goto GASLOC**  **ELSE** goto VOPOIL  100: goto ERR2\_VOPBSPER |
| 12C | GASLOC | New variable asked of 4th interviews in interview periods 201607, 201608, and 201609 if VOPGASX ne 0, REF | N/A | **From ^REF\_MONTH through ^LAST\_MONTH, where did ^YOU\_YRCU ^Qtypefill purchase gas?**   * Enter city and state   Qtypefill instructions:  If QTYPE2=1, fill “**last**”  If QTYPE2=2, fill “**most frequently**”  Skip instructions:  200 characters, DK, REF: goto VOPOIL |

**Section 17 changes**

| **CEQ Section** | **CEQ CAPI Variable** | **Change Detail** | **201502 Wording/Specification** | **201607 Wording/Specification** |
| --- | --- | --- | --- | --- |
| 17 | SUBEXPX | Update skip instructions to account for outlet test questions when INTNMBR=4, ITEM=11, and INTPER= 201607, 201608, or 201609 (changes in **red**) | **^SUBEXPX\_fill ^SHIPHANDL**  ^Ticketservfee  Skip instructions:  If (ITEM=1 or 2 and AMOUNT lt 5 or gt 1060) OR  (ITEM=3 and AMOUNT lt 6 or gt 750) OR  (ITEM=4 and AMOUNT lt 800 or gt 10,000) OR  (ITEM=5 and AMOUNT lt 5 or gt 300) OR  (ITEM=6 and AMOUNT lt 5 or gt 300) OR  (ITEM=7 and AMOUNT lt 5 or gt 300) OR  (ITEM=8 and AMOUNT lt 5 or gt 1200) OR  (ITEM=9 and AMOUNT lt 5 or gt 2500) OR  (ITEM=10 and AMOUNT lt 5 or gt 720) OR  (ITEM=11 and AMOUNT lt 5 or gt 320) OR  (ITEM=12 and AMOUNT lt 5 or gt 250) OR  (ITEM=13 and AMOUNT lt 7 or gt 145) OR  (ITEM=14 and AMOUNT lt 7 or gt 145) OR  (ITEM=15 and AMOUNT lt 5 or gt 300) OR  (ITEM=16 and AMOUNT lt 5 or gt 100) OR  (ITEM=17 and AMOUNT lt 5 or gt 150) OR  (ITEM=18 and AMOUNT lt 1 or gt 250) OR  (ITEM=19 and AMOUNT lt 1 or gt 100) OR  (ITEM=20 and AMOUNT lt 1 or gt 209) OR  (ITEM=21 and AMOUNT lt 5 or gt 150) OR  (ITEM=22 and AMOUNT lt 1 or gt 100) OR  (ITEM=23 and AMOUNT lt 8 or gt 200) OR  (ITEM=24 and AMOUNT lt 8 or gt 390) OR  (ITEM=25 and AMOUNT lt 1 or gt 30) OR  (ITEM=26 and AMOUNT lt 1 or gt 50) then goto ERR1\_AMOUNT  ELSEIF ITEMCODEOUT and the entry in AMOUNT for this record are equal to any records data on the pre-chart/Input then goto ERR\_DUP  ELSEIF ITEM=18, 20, 21, 22, or 25, goto C  ELSE goto MORE | **^SUBEXPX\_fill ^SHIPHANDL**  ^Ticketservfee  Skip instructions:  If (ITEM=1 or 2 and AMOUNT lt 5 or gt 1060) OR  (ITEM=3 and AMOUNT lt 6 or gt 750) OR  (ITEM=4 and AMOUNT lt 800 or gt 10,000) OR  (ITEM=5 and AMOUNT lt 5 or gt 300) OR  (ITEM=6 and AMOUNT lt 5 or gt 300) OR  (ITEM=7 and AMOUNT lt 5 or gt 300) OR  (ITEM=8 and AMOUNT lt 5 or gt 1200) OR  (ITEM=9 and AMOUNT lt 5 or gt 2500) OR  (ITEM=10 and AMOUNT lt 5 or gt 720) OR  (ITEM=11 and AMOUNT lt 5 or gt 320) OR  (ITEM=12 and AMOUNT lt 5 or gt 250) OR  (ITEM=13 and AMOUNT lt 7 or gt 145) OR  (ITEM=14 and AMOUNT lt 7 or gt 145) OR  (ITEM=15 and AMOUNT lt 5 or gt 300) OR  (ITEM=16 and AMOUNT lt 5 or gt 100) OR  (ITEM=17 and AMOUNT lt 5 or gt 150) OR  (ITEM=18 and AMOUNT lt 1 or gt 250) OR  (ITEM=19 and AMOUNT lt 1 or gt 100) OR  (ITEM=20 and AMOUNT lt 1 or gt 209) OR  (ITEM=21 and AMOUNT lt 5 or gt 150) OR  (ITEM=22 and AMOUNT lt 1 or gt 100) OR  (ITEM=23 and AMOUNT lt 8 or gt 200) OR  (ITEM=24 and AMOUNT lt 8 or gt 390) OR  (ITEM=25 and AMOUNT lt 1 or gt 30) OR  (ITEM=26 and AMOUNT lt 1 or gt 50) then goto ERR1\_AMOUNT  ELSEIF ITEMCODEOUT and the entry in AMOUNT for this record are equal to any records data on the pre-chart/Input then goto ERR\_DUP  ELSEIF ITEM=18, 20, 21, 22, or 25, goto C  **ELSEIF INTNMBR=4 AND (INTPER=201607, 201608, or 201609) AND ITEM=11, goto TICSTORE**  ELSE goto MORE |
| 17 | TICSTORE | New variable asked of 4th interviews in interview periods 201607, 201608, and 201609 for ITEM=11 | N/A | **Where did you purchase these tickets?**   * Enter store, website, or company name. If purchased from a private individual, enter “private individual.”   Store instructions:  If ENTRY ends with “.com”, “.Com”, “.cOm”, “.coM”, “.COm", “.CoM”, “.cOM”, or “.COM”, then set TICPURCH=1  Skip instructions:  30 characters: if ENTRY ends with “.com”, “.Com”, “.cOm”, “.coM”, “.COm", “.CoM”, “.cOM”, or “.COM”, then goto MORE  ELSE goto TICPURCH  DK, REF: goto MORE |
| 17 | TICPURCH | New variable asked of 4th interviews in interview periods 201607, 201608, and 201609 for ITEM=11 if text entry does not end in some variation of “.com” | N/A | * Ask if not apparent:   **Was this purchased online or in-person?**   1. Online 2. In person   Skip instructions:  1, DK, REF: goto MORE  2: goto TICLOC |
| 17 | TICLOC | New variable asked if TICPURCH=2 | N/A | **Where is [fill: TICSTORE] located?**   * Enter city and state   TICSTORE fill instructions:  Fill entry from TICSTORE  Skip instructions:  200 characters, DK, REF: goto MORE |

**BACK changes**

| **CEQ Section** | **CEQ CAPI Variable** | **Change Detail** | **201502 Wording/Specification** | **201607 Wording/Specification** |
| --- | --- | --- | --- | --- |
| BACK | New variable CARDPIN | New question for 1st interviews with QTYPE=1-3 to be asked of completed interviews prior to DK\_CHECK | N/A | **The letter we mailed you indicated that we would provide you with the PIN number for the debit card upon completion of the interview. Since we have now completed the interview, I can inform you that the PIN number is the last 4 digits of the card number.**   1. Enter 1 to continue   Skip instructions:  IF QTYPE=1 or 2 goto R\_USE  ELSE goto DK\_CHECK |
| BACK | New variable  R\_USE | New FR question for 1st interview cases with QTYPE=1 or 2 on whether the respondent(s) used or referred to any records during the course of the interview | N/A | * Did the respondent(s) refer to at least one record or receipt – either paper or digital – during the interview?  1. Yes 2. No   Skip instructions:  1: goto CARDNAME  2: goto DK\_CHECK |
| BACK | New variable CARDNAME | New question if R\_USE=1 to pick up the name the $20 debit card should be addressed to (1st interview cases with QTYPE=1 or 2 AND RUSE=1) | N/A | **The letter we mailed you also indicated that you would receive an additional $20 debit card for using any records during this interview. We will mail this debit card to ^YOU\_YRCU within the next month. Who would you like this addressed to?**  Skip instructions:  100 characters, DK, RF: goto DK\_CHECK |
| BACK | USERECS | Change response options by removing percentages and rewording the remaining descriptions on items 3 and 4 (changes in **red**) | * In this interview, how often did the respondent consult records?  1. Always or almost always **(90% of the time or more)** 2. Most of the time **(50% to 89% of the time)** 3. Occasionally **(10% to 49% of the time)** 4. Never **or almost never** **(less than 10% of the time)**   Skip instructions:  1-3: goto TYPERECS  4: goto HOMEFILE | * In this interview, how often did the respondent consult records?  1. Always or almost always 2. Most of the time 3. Occasionally **or used at least one record** 4. Never **- no records used**   Skip instructions:  1-3: goto TYPERECS  4: goto HOMEFILE |
| BACK | TYPERECS | * Update skip instructions due to deletion of REC\_SECT, addition of new question RSECTN , and changes to the response options (changes in **red**) * Updates to response options (changes in **red**) –   + Deleting the ‘none’ option   + Rewording #4 to “Receipts or email receipts”   + Changing the “of” in #6 to “or”   + Rewording #7 to “Credit card, bank, or online bill-paying statements”   + Adding “pay stub” as #8 and renumbering “other – specify” to #9 | * What types of bills, receipts, or records did the respondent(s) use to answer expenditure questions?   Enter all that apply, separate with commas.   1. Bills 2. Checkbook ledger or check stubs 3. Personal finance or budgeting software records 4. Receipts **of purchase (e.g., sales slips)** 5. Home file (provided by Census Bureau) 6. Contracts **of** agreements 7. **B**ank **statements or** online bill-paying statements 8. Other – specify 9. **None**   Skip instructions:  1-**7**: goto **RECT\_SEC**  **8**: goto SPECRECS  **9: If 9 is selected with any other answer list option, then goto CK\_TYPERCS else goto HOMEFILE** | * What types of bills, receipts, or records did the respondent(s) use to answer expenditure questions?   Enter all that apply, separate with commas.   1. Bills 2. Checkbook ledger or check stubs 3. Personal finance or budgeting software records 4. Receipts **or email receipts** 5. Home file (provided by Census Bureau) 6. Contracts **or** agreements 7. **Credit card, b**ank**,** or online bill-paying statements 8. **Pay stub** 9. Other – specify   Skip instructions:  1-8: goto **RSECTN**  9: goto SPECRECS |
| BACK | SPECRECS | Update skip instructions due to deletion of REC\_SECT and addition of new question RSECTN (changes in **red**) | * Specify:   Skip instructions:  goto **RECT\_SEC** | * Specify:   Skip instructions:  goto **RSECTN** |
| BACK | RECT\_SEC | Delete variable (replacing with RSECTIONS) | * Which of these sections did the respondent(s) use bills, receipts, or other resources to answer expenditure questions? * Enter all that apply, separate with commas  1. Sections 2 and 3 Housing – rent, mortgage, home equity loans 2. Section 4 Utilities/Communications (electricity, heating, telephone, cable, internet) 3. Section 6 Appliances 4. Section 8 Home Furnishings 5. Section 9 Clothing 6. Section 10, 11, and 12 Vehicle Expenses 7. Section 13 and 14 Insurance 8. Section 15 Medical/Health Expenses 9. Section 18 Trips and Vacations 10. Section 21 Work Experience and Income   Skip instructions:  goto HOMEFILE | Delete variable |
| BACK | RSECTN | New variable to replace RECT\_SEC | N/A | * Which of these sections did the respondent(s) use bills, receipts, or other resources to answer expenditure questions? * Enter all that apply, separate with commas  1. Section 1 General Housing Characteristics 2. Section 2 Rented Living Quarters 3. Section 3 Owned Living Quarters & Other Owned Real Estate 4. Section 4 Utilities and Fuels 5. Section 5 Construction, Repairs, Alterations, and Maintenance of Property 6. Section 6 Appliances, Household Equipment, and Other Selected Items 7. Section 7 Household Item Repairs, Service Contracts, and Extended Warranties 8. Section 8 Home Furnishings and Related Household Items 9. Section 9 Clothing and Clothing Services 10. Section 10 Rented and Leased Vehicles 11. Section 11 Owned Vehicles 12. Section 12 Vehicle Operating Expenses 13. Section 13 Insurance Other than Health 14. Section 14 Health Insurance 15. Section 15 Medical and Health Expenses 16. Section 16 Educational Expenses 17. Section 17 Subscriptions, Memberships, Books, and Entertainment Expenses 18. Section 18 Trips and Vacations 19. Section 19 Miscellaneous Expenses 20. Section 20 Expense Patterns for Selected Goods and Services 21. Section 21 Work Experience and Income 22. Section 22 Assets and Liabilities   Skip instructions:  goto HOMEFILE |