

Consumer Expenditure CEQ Survey July 2018 Instrument Requirements – CEQ Worksheet Test

Case Management changes

- A label field called “Test Group” on the Assignment tab/screen similar to the “Incentives” label used for the Incentives test in 2016 so that FRs will be able to see whether a case has been assigned to a test in Case Management:
 - o IF INTNMBR=3 AND QTYPE=2, then display “Worksheet eligible”
 - o IF INTNMBR=4 AND CEQW_FLG=1, then display “Worksheet provided”

SCIF changes for CEQ Worksheet test

CEQ Section	CEQ CAPI Variable	Change Detail	201704 Wording/Specification	201807 Wording/Specification
SCIF	QTYPE	<ul style="list-style-type: none"> • Set 200 Interview 3 cases in each interview period from 201807 through 201809 to 2 (CEQW) • All other cases should have QTYPE blank 	n/a	<p>For each interview period 201807, 201808, and 201809, DSMD should assign 200 interview 3 cases to Group 2 (CEQW) and the remaining will be Blank (normal interview).</p> <p>Blank = normal interview 2 = CEQW – eligible to receive the CEQ Worksheet</p> <p>This flag should NOT be copied to spawns but should be carried forward throughout the case’s time in sample.</p>
SCIF	CEQW_FLG	Set during post-processing for 3 rd interview cases in 201807-201809 with QTYPE=1 and CEQWOFFR=1	n/a	<p>1 = CEQ Worksheet provided Blank = all other situations</p> <p>This flag should NOT be copied to spawns but should be carried forward to the case’s 4th/final interview.</p>

CEINTRO Section

CEQ Section	CEQ CAPI Variable	Change Detail	201704 Wording/Specification	201807 Wording/Specification
CEINTRO	BUSCREEN	Update skip instructions due to test questions for CEQ Worksheet	<p>Since the first of ^REF_MONTH, have ^YOU_ANYMEM had any expenses that will be reimbursed or deducted as business expenses?</p> <ol style="list-style-type: none"> Yes No <p><u>Skip instructions:</u> 1,DK,RF: Goto BUSXPNSE 2: Exit block and goto BSECT01</p>	<p>Since the first of ^REF_MONTH, have ^YOU_ANYMEM had any expenses that will be reimbursed or deducted as business expenses?</p> <ol style="list-style-type: none"> Yes No <p><u>Skip instructions:</u> 1,DK,RF: Goto BUSXPNSE 2: IF CEQW_FLG=1 goto CEQW_REV ELSE Exit block and goto BSECT01</p>
CEINTRO	BUSXPNSE	Update skip instructions due to test questions for CEQ Worksheet	<p>For certain topics, such as housing, utilities, or vehicles, I will ask you to estimate how much of the expense was or will be deducted as a business expense.</p> <ol style="list-style-type: none"> Enter 1 to continue <p><u>Skip instructions:</u> Exit block and goto BSECT01</p>	<p>For certain topics, such as housing, utilities, or vehicles, I will ask you to estimate how much of the expense was or will be deducted as a business expense.</p> <ol style="list-style-type: none"> Enter 1 to continue <p><u>Skip instructions:</u> IF CEQW_FLG=1 goto CEQW_REV ELSE Exit block and goto BSECT01</p>
CEINTRO	CEQW_REV	New FR question to ask if the worksheet was provided in the previous/3 rd interview (CEQW_FLG=1)	n/a	<p>* Are you currently talking to the respondent in person or by phone?</p> <ol style="list-style-type: none"> In person By phone <p><u>Skip instructions:</u> 1: goto CEQW_OBS 2: goto CEQWDHAV</p>
CEINTRO	CEQW_OBS	New FR question on whether Worksheet is available for use during interview if the interview is being conducted by phone	n/a	<p>* Does the respondent have the CEQ Worksheet provided last quarter available?</p> <ol style="list-style-type: none"> Yes No <p><u>Skip instructions:</u> 1: goto CEQW_HAV 2: goto CEQWDHAV</p>
CEINTRO	CEQW_HAV	New question on whether the respondent used the Worksheet	n/a	<p>I see that you have the worksheet that I provided at the last interview. Did you use it?</p> <ol style="list-style-type: none"> Yes

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				<p>2. No</p> <p><u>Skip instructions:</u> 1: goto CEQW_REF 2, DK, REF: goto CEQWNUSE</p>
CEINTRO updated 8/18/17	CEQWDHAV	<p>New question to ask respondent on Worksheet if FR does not see it available (CEQW_OBS=2)</p> <p>8/18/17: Updated skip instructions by moving the going to CEQ_PHN if CEQW_REV=2 to the 'yes' (1) response</p>	n/a	<p>At the last interview, I left a worksheet for you to help you get ready for this interview. Did you use it?</p> <p>1. Yes, 2. No</p> <p><u>Skip instructions:</u> 1: IF CEQW_REV=2 goto CEQ_PHN ELSE goto CEQW_REF 2, DK, REF: goto CEQWNUSE</p>
CEINTRO	CEQW_PHN	New respondent question on Worksheet if interview is conducted by phone and respondent indicated using worksheet	n/a	<p>Do you have it available for our interview today?</p> <p>1. Yes 2. No</p> <p><u>Skip instructions:</u> 1: goto CEQW_REF 2, DK, REF: CEQWNUSE</p>
CEINTRO	CEQW_REF	New question on Worksheet – reminding respondent to use during interview	n/a	<p>If you could keep the worksheet out, it will be helpful to reference as we go through the interview.</p> <p>1. Enter 1 to continue</p> <p><u>Skip instructions:</u> Exit block and goto BSECT01</p>
CEINTRO	CEQWNUSE	New question on Worksheet – notifying respondent we'll ask about why they didn't use it at the end of the interview	n/a	<p>I will have a few questions at the end of the interview to ask you regarding the worksheet, but for now, let's continue with the interview.</p> <p>1. Enter 1 to continue</p> <p><u>Skip instructions:</u> Exit block and goto BSECT01</p>

BACK Section

CEQ Section	CEQ CAPI Variable	Change Detail	201704 Wording/Specification	201807 Wording/Specification
BACK (Research block)	RES04	7/27/2017: Update skip instructions for new CEQW questions	<p>In thinking about the length of today's survey, would you say that it was...</p> <ol style="list-style-type: none"> 1. Very short? 2. Somewhat short? 3. Neither short nor long? 4. Somewhat long? 5. Very long? <p><u>Skip instructions:</u> Exit BResearch block and goto DK_CHECK</p>	<p>In thinking about the length of today's survey, would you say that it was...</p> <ol style="list-style-type: none"> 1. Very short? 2. Somewhat short? 3. Neither short nor long? 4. Somewhat long? 5. Very long? <p><u>Skip instructions:</u> IF CEQWNUSE=1 GOTO CEQW_NO ELSEIF CEQW_REF=1 GOTO CEQWEASY ELSE Exit BResearch block and goto DK_CHECK</p>
BACK (Research block)	CEQW_NO	New question to ask if CEQWNUSE=1 (respondents did not use worksheet)	n/a	<p>At the beginning of our interview, you indicated that you did not use the worksheet provided at the last interview. Why did you not use the worksheet?</p> <ul style="list-style-type: none"> • Enter all that apply, separate with commas <ol style="list-style-type: none"> 1. Too much work 2. Too busy 3. Privacy concern 4. Doesn't understand the purpose of the worksheet 5. Other, specify <p><u>Skip instructions:</u> IF 5selected,; goto CEQWNOSP ELSE goto CEQWCOMM</p>
BACK (Research block)	CEQWNOSP	New specify question if 5 selected in CEQW_NO.	n/a	<p>* Specify:</p> <p><u>Skip instructions</u> goto CEQWCOMM</p>
BACK (Research block)	CEQWEASY	New question to ask if CEQW_REF=1 (respondents used worksheet)	n/a	<p>I'm going to ask you a few questions about the worksheet. Did you find the Worksheet easy or difficult to fill out?</p> <ol style="list-style-type: none"> 1. Easy 2. Difficult

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				<u>Skip instructions:</u> goto CEQWBUR
BACK (Research block)	CEQWBUR	New question on Worksheet	n/a	How long do you think you spent filling the worksheet out? <ul style="list-style-type: none"> • Enter number of minutes <u>Skip Instructions:</u> Goto CEQWTIME
BACK (Research block)	CEQWTIME	New question on Worksheet	n/a	Do you feel that using the worksheet helped make the interview go faster? <ol style="list-style-type: none"> 1. Yes 2. No <u>Skip instructions:</u> goto CEQWQUAL
BACK (Research block)	CEQWQUAL	New question on Worksheet	n/a	Do you feel that using the worksheet helped you give more accurate information about your spending? <ol style="list-style-type: none"> 1. Yes 2. No <u>Skip instructions:</u> goto CEQW_AGN
BACK (Research block)	CEQW_AGN	New question on Worksheet	n/a	This is your last interview, but if you were asked to do another interview would you want to use the worksheet again? <ol style="list-style-type: none"> 1. Yes 2. No 3. Unsure/DK <u>Skip instructions:</u> goto CEQWCOMM
BACK (Research block)	CEQWCOMM	New question on Worksheet	n/a	Do you have any suggestions on how we could improve the Worksheet? <ol style="list-style-type: none"> 1. Yes 2. No <u>Skip instructions:</u> 1: goto CEQW_SP

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				2, DK, RF: goto DK_CHECK
BACK (Research block)	CEQW_SP	New question on Worksheet	n/a	What are your suggestions? <u>Skip instructions:</u> goto DK_CHECK
BACK	THANKYOU	Update skip instructions to account for offering worksheet to 3 rd interviews with QTYPE=2	This concludes the interview. Thank you for your patience, and for taking the time to answer our questions. Let me remind you that the information you provide is very valuable because it is used to update the Consumer Price Index, which is one of our nation's leading economic indicators. That is why we sincerely appreciate your participation in this survey^Thankyou_FILL. Interview number: ^INTNMBR NOTE: Inform the respondent that a supervisor may call them to conduct re-interview. Explain re-interview as needed. <u>Skip instructions:</u> IF INTNMBR = 1-3 then goto QTRAPPT ELSE goto HOW_INTV	This concludes the interview. Thank you for your patience, and for taking the time to answer our questions. Let me remind you that the information you provide is very valuable because it is used to update the Consumer Price Index, which is one of our nation's leading economic indicators. That is why we sincerely appreciate your participation in this survey^Thankyou_FILL. Interview number: ^INTNMBR NOTE: Inform the respondent that a supervisor may call them to conduct re-interview. Explain re-interview as needed. <u>Skip instructions:</u> IF INTNMBR=3 and QTYPE=2 goto CEQW_1 ELSEIF INTNMBR = 1-3 then goto QTRAPPT ELSE goto HOW_INTV
BACK	CEQW_1	7/21/2017: New question for 3 rd interviews with QTYPE=2 to be asked of completed interviews. Ask after the THANKYOU section.	n/a	* This case was selected for receipt of a CEQ Worksheet at the end of this interview and used for the 4 th interview. Are you currently talking to the respondent in person or by phone? 1. In person 2. By phone <u>Skip instructions:</u> 1: goto CEQW_BEN 2: goto QTRAPPT
BACK	CEQW_BEN	7/21/2017: New question for 3 rd interviews with QTYPE=2 to be asked of	n/a	* Do you believe this respondent would benefit from the use of a CEQ Worksheet?

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		completed interviews		<p>If you do not have the CEQ Worksheet available to give to the respondent, enter No.</p> <ol style="list-style-type: none"> 1. Yes 2. No <p><u>Skip instructions:</u> 1: go to CEQWOFFR 2: go to QTRAPPT</p>
<p>BACK Updated 8/18/17</p>	CEQWOFFR	<p>7/21/2017: New question about receiving the worksheet (if CEQW_BEN=1)</p> <p>8/18/2017:</p> <ul style="list-style-type: none"> • Updated “store instructions” to “posts-processing store instructions” • In skip instructions, changed variable name ‘CEQW_REF’ to ‘CEQW_RF’ 	n/a	<p>* Show the worksheet to the respondent</p> <p>I have a worksheet that may help at our next interview. The worksheet shows you the types of spending that I’ll be asking about, and if you note these expenses on the worksheet, the interview may be faster while also making it easier for you to give accurate amounts. This worksheet is completely optional and will only be used for YOUR reference during our interview, I will not collect it from you. Would you like me to leave this worksheet with you?</p> <ol style="list-style-type: none"> 1. Yes 2. No <p><u>Post-processing store instructions:</u> IF CEQWOFFR=1 then set CEQW_FLG=1.</p> <p><u>Skip instructions:</u> 1: goto QTRAPPT 2: go to CEQW_RF</p>
<p>BACK Updated 8/18/17</p>	CEQW_RF	<p>7/21/2017: New question for respondents who do not want the worksheet</p> <p>8/18/2017:</p>	n/a	<p>Can you tell me why you prefer not to use the Worksheet?</p> <ul style="list-style-type: none"> • Enter all that apply, separate with commas. <ol style="list-style-type: none"> 1. Not interested 2. Seems like too much work 3. Too busy 4. Privacy concern

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		<ul style="list-style-type: none"> Updated skip instructions to reflect 'select all that apply' aspect. Changed variable name 'CEQW_REF' to 'CEQW_RF' 		<p>5. Other, specify</p> <p><u>Skip instructions:</u> If 5 selected then goto CEQW_RFS ELSE goto QTRAPPT</p>
BACK Updated 8/18/17	CEQW_RFS	<p>7/21/2017: Specify question if 'Other, specify' is selected in CEQW_RF</p> <p>8/18/17: Changed variable name from CEQ_REFS to CEQW_RFS</p>	n/a	<p>* Specify:</p> <p><u>Skip instructions:</u> goto QTRAPPT</p>
BACK Updated 8/18/17	HOMEFILE	<p>7/28/17: Update skip instructions to account for CEQW_NO and CEQW_NOSP questions to be asked of FRs that indicated they did not think the respondent would benefit from the worksheet</p> <p>8/18/2017: Changed follow-up variable name to 'NOBEN' (for if CEQW_BEN=2)</p>	<ul style="list-style-type: none"> Did you give the respondent a Home File this quarter? <ol style="list-style-type: none"> Yes No <p><u>Skip instructions:</u> goto INFOBOOK</p>	<ul style="list-style-type: none"> Did you give the respondent a Home File this quarter? <ol style="list-style-type: none"> Yes No <p><u>Skip instructions:</u> IF CEQW_BEN=2 goto NOBEN ELSE goto INFOBOOK</p>
BACK Updated 8/18/17	NOBEN	<p>7/21/2017: FR question for those that indicated that they didn't think the respondent would benefit from the worksheet (CEQW_BEN=2)</p> <p>8/18/17: Changed variable name from</p>	n/a	<p>* Why do you think this respondent wouldn't benefit from the use of a worksheet? Enter all that apply, separate with commas.</p> <ol style="list-style-type: none"> Good rapport not built Concerned about privacy Distrusts government Hesitant to participant in next interview Did not have worksheet available Other, specify

CEQ Section	CEQ CAPI Variable	Change Detail	201704 Wording/Specification	201807 Wording/Specification
		'CEQ_NO' to 'NOBEN'		<p><u>Skip instructions:</u> 1-5, DK, RF: goto INFOBOOK 6: Goto NOBENSP</p>
<p>BACK Updated 8/18/17</p>	<p>NOBENSP</p>	<p>7/21/2017: New variable if 'Other, specify' selected in CEQW_NO</p> <p>8/18/17: Changed variable name from 'CEQW_NOSP' to 'NOBENSP'</p>	<p>n/a</p>	<p>* <u>Specify:</u></p> <p><u>Skip instructions:</u> Goto INFOBOOK</p>