

Spending Diary

Thank you for agreeing to participate in the Consumer Spending Survey. We understand that this task takes time; however, your information is very important to us and will be used for many purposes that affect all Americans.

The Bureau of Labor Statistics, its employees, agents, and partner statistical agencies, will use the information you provide for statistical purposes only and will hold the information in confidence to the full extent permitted by law. In accordance with the Confidential Information Protection and Statistical Efficiency Act and other applicable Federal laws, your responses will not be disclosed in identifiable form without your informed consent. Per the Federal Cybersecurity Enhancement Act of 2015, Federal information systems are protected from malicious activities through cybersecurity screening of transmitted data. If you have comments regarding this survey, please email them to kp_opsupport@knowledgepanel.com.

Questions?

Contact the Spending Diary Help Desk by email at kp_opsupport@knowledgepanel.com or by telephone at 1-888-288-0021 (Monday-Saturday 9am-5pm Eastern)

What Should I Enter in the Diary?

Complete the Spending Diary for the entire two weeks. Enter EVERYTHING you and your household spend money on each day (see exceptions below) – the products you buy, the services you use, and the household expenses you have during the week – no matter how large or small they are. Do NOT use abbreviations for any item descriptions.

The only items you should **not** include in your diary are:

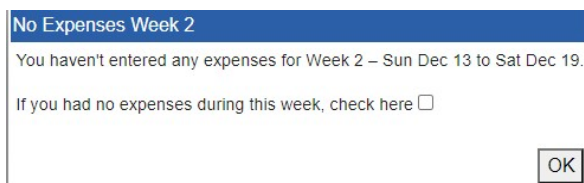
- Expenses while you were away from home overnight
- Business or farm operating expenses
- Sales tax, except for Meals, Snacks, and Drinks Away from Home

Help

To access Help tools, click the “Help” button on the top right of the screen. Here you will have the following options: User Guide, Video Tutorials, General Instructions, How to Fill Out Your Diary, Diary Examples, FAQs, and Definitions.

No Expenses

If you had no expenses during your diary week, login to the diary on or after the last day of your diary week and you will see the following checkbox. Check the box to confirm that you had no expenses during the week.



No Expenses Week 2

You haven't entered any expenses for Week 2 – Sun Dec 13 to Sat Dec 19.

If you had no expenses during this week, check here

OK

Logout

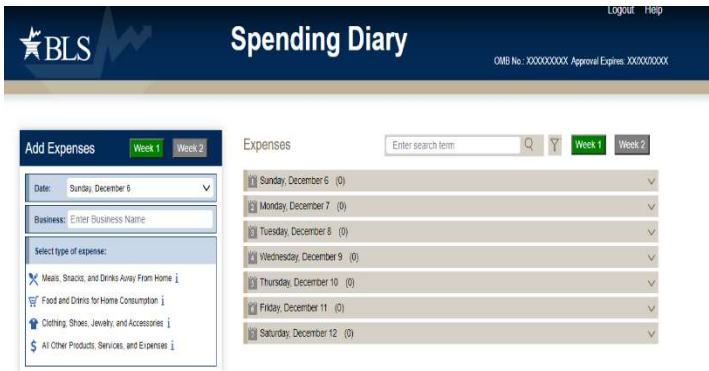
To protect your privacy, the Spending Diary will automatically log you out if there is no activity for more than 15 minutes. You can also logout at any time by clicking on the “Logout” button. To re-enter the survey, please select the study survey link provided in your KnowledgePanel Member Portal or using an e-mail associated with this study. To prevent losing data you have entered, please remember to save your entries.

Entering Expenses

Below are examples of your home screen where you will be able to view a summary of your entered expenses and add new expenses. Please refer to Page 4 for more detailed instructions on how to add an expense.

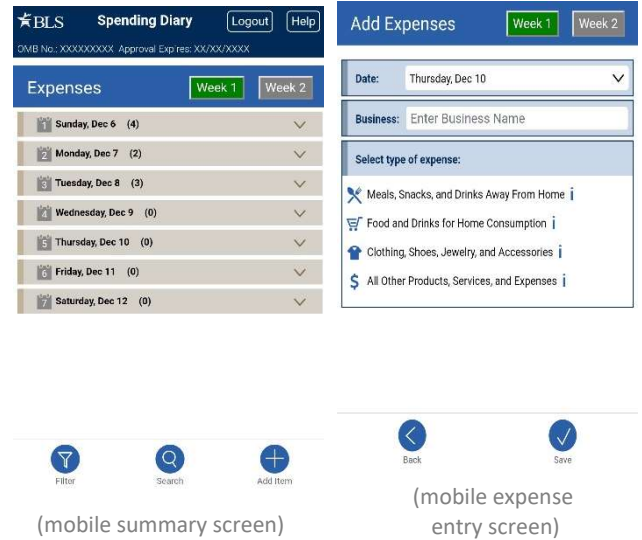
Desktop Version

To add an expense, you will enter information by first selecting the appropriate week and then the date of the expense on the left side of the screen.



Mobile Version

To add an expense, tap on the “Add Item” icon on the bottom right of the summary screen. An expense entry screen will appear allowing you to add a new expense.



View, Edit, or Delete an Expense

To help you find a particular entry, you can enter a search term in the search box on the top right of your desktop version. In the mobile version, tap on the “Search” icon on the bottom of the summary screen. You can view your expenses by selecting Week 1 or Week 2 and clicking on a specific date to expand the selection and view the expenses entered for that date.



Desktop Version

To delete an expense, click on the trash can icon to the right of the expense. To view or edit an expense, click on the pencil icon to the far right of the expense. In the left entry space, you will be able to make any changes and select “Update” or “Cancel.”



Mobile Version

To delete an expense, click on the trash can icon to the right of the expense. To view or edit an expense, click on the pencil icon to the far right of the expense. When you click on edit, you will be taken to the expense entry screen where you will be able to make any changes and select “Update” or “Back” to cancel.



Adding Expenses to Your Spending Diary

The Expense Entry screen on the mobile version is on a separate screen, but the entry fields are the same.

Select the date the purchase was made.

Enter the name of the business.

Select the category.

To save the expense entry, select Save.

Category Specific Questions

After you select a category, additional questions specific to that category will appear for you to complete.

See examples below:

Meals, Snacks, and Drinks Away from Home

- Enter the total cost (include tax and tip)
- Select the vendor type
- Indicate if alcohol was included and the cost of alcohol, if applicable

Food and Drinks for Home Consumption

- Describe the item or expense
- Enter the cost (do not include tax)
- Select the type of packaging

Clothing, Shoes, Jewelry, and Accessories

- Describe the item or expense
- Enter the cost (do not include tax)
- Select the gender and age

All Other Products, Services, and Expenses

- Describe the item or expense
- Enter the cost (do not include tax)

Meals Snacks and Drinks Away from Home vs. All Other Categories

Something you should keep in mind when entering your expenses is that the Meals, Snacks, and Drinks Away from Home category is different from the other categories. See below for examples with entries in the Mobile version.

Meals, Snacks, and Drinks Away from Home

In the Meals, Snacks, and Drinks Away from Home category, you will enter the entire meal/purchase as one entry and enter the total cost of the meal including tax and tip.

The image shows a receipt from Green Onion Bistro and the mobile app interface for entering an expense. The receipt lists items and their prices, with the total amount circled in red. The app interface shows the date, business name, and the selected expense category. Red arrows indicate the mapping between the receipt items and the app fields.

Item	Price
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
Red wine	9.00
Subtotal	66.00
Sales Tax	6.60
Total	72.60
Gratuity	15.00
Total	87.60

The app interface shows the following details:

- Date: Friday, December 11
- Business: Green Onion Bistro
- Select type of expense: Meals, Snacks, and Drinks Away From Home
- Total cost (include tax and/or tip): \$ 87.60
- Select Type of Vendor: Full Service Places
- Select any alcohol included: Wine (checked)
- Enter the total cost of the alcohol: \$ 9.00

All Other Categories

For all of the other three categories, you will enter each item purchased as a separate entry and enter the cost of the item without tax.

The image shows a receipt from ValuMart and the mobile app interface for entering multiple expenses. The receipt lists items and their prices, with the total amount circled in red. The app interface shows the date, business name, and the selected expense category. Red arrows indicate the mapping between the receipt items and the app fields.

Item	Price
VM WHOLE MILK	3.29
6-PK SOCKS	7.99
PAPER TOWELS	11.99
LAUNDRY DETERGENT	18.99
SHAMPOO	2.94
CONDITIONER	2.94
SZ 3 DIAPERS	41.99
SUBTOTAL	99.30
VA TAX 5.0%	4.97
TOTAL	104.27

The app interface shows the following details for each item:

- Date: Friday, December 11
- Business: ValuMart
- Select type of expense: Food and Drinks for Home Consumption
- Describe item or expense: Whole Milk
- Total cost (do not include tax): \$ 3.29
- How was the item packaged: Fresh
- Was this item for: Girl 2-15
- Total cost (do not include tax): \$ 7.99
- Describe item or expense: 6 pack socks
- Total cost (do not include tax): \$ 11.99
- Describe item or expense: Paper towels
- Total cost (do not include tax): \$ 11.99

Frequently Asked Questions

1. How detailed should my descriptions be?

Refer to the Diary Examples page in the Help menu for examples of the level of detail needed in each part. Do not rely solely on brand names.

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

Locate the saved expense listed under the relevant date in the Expenses section of the main page. To delete the expense, click on the trash can icon next to the cost and select 'ok' to confirm. To make any changes, click on the pencil icon next to the trash can. Make any changes in the Edit Expense box and click the 'Update' button to save your changes.

3. How should I record multiple quantities?

You may group identical items on the same entry and enter a total cost of all the items, or you may write each item on a separate entry with the individual cost.

4. 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.

5. How should I record credit card purchases?

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

6. Should I record automatic deductions taken from my paycheck or bank account?

Yes, record automatic deductions (such as health insurance premiums taken out of your account or paycheck) only if they are deducted that week. Write them in the section called All Other Products, Services, and Expenses.

7. Should I record typical monthly bills?

Yes, record typical monthly bills only if you pay them during the week that you have the diary. Enter them in the section called All Other Products, Services, and Expenses.

8. What should I do when I use coupons, discount cards, or loyalty cards?

Subtract the discount from the original price and enter the amount that you paid.

9. Can I just give you receipts instead of entering the information online?

No, we need you to enter the information into the online diary. We encourage you to save your receipts to remember to record what you bought or paid for.

10. How should I record items if I don't know whether it includes tax?

Write down the amount paid.

11. What if I make a contribution or charitable donation?

Record money contributions or donations in the section called All Other Products, Services, and Expenses.

12. What about gift certificates or gift cards?

If you buy a gift certificate to give to someone, write down the cost of it under the appropriate section (e.g., a certificate to a clothing store would go under Clothing, Shoes, Jewelry, and Accessories and a certificate to a department store would go under All Other Products, Services, and Expenses. If you use a gift card, enter the full amount for your purchase as if paid with cash.

13. What do I do about returns and exchanges?

If an item is bought and returned during the diary period, it can be deleted (see FAQ 2). If it was bought outside the diary period and returned during the period, do not make any entry. If an item is exchanged during the diary period, change or edit the item that was returned to the new item and its cost on the day the exchange was made (see FAQ 2).

14. Should I record subsidized/reimbursed expenses?

Yes, but if someone not in your household pays for or helps pay for an expense or if you will be reimbursed for an expense, only record the amount that you or someone in your household has to pay.

15. What should I do about shipping & handling costs?

Include the shipping & handling cost in the total price of the item. If the shipping & handling covered multiple items, include the shipping & handling in the total price of one item from the order.

16. How do I know what items to report for each type of expense?

Click or tap on the icon next to each expense type category.

17. What's the difference between a concession stand and a mobile vendor?

A concession stand has to stay in a permanent location and a mobile vendor does not. Some mobile vendors may seem permanent because they are usually in the same location, but they are still considered mobile vendors because they have the option to change locations.