Consumer Expenditure Diary
Email Specification

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Revision Number	**Date**	**Location**	**Action (Addition, Deletion, Change)**
1	4/24/2020	I. Overview of Procedure and Timeline	Change to bullet # 3 (page 3): updated start and end for operation
1	4/24/2020	III. NPC Instructions for Populating Emails	Change to section A bullet # 5 (page 4 and 5): updated Welcome email content
1	4/24/2020	III. NPC Instructions for Populating Emails	Change to section A bullet # 6: updated fill instructions for START to reflect actual production process
1	4/24/2020	III. NPC Instructions for Populating Emails	Deletion: removed Regional Office phone number fills from Welcome Email
1	4/24/2020	III. NPC Instructions for Populating Emails	Change to section B bullet #5 (page 6): updated Reminder email content
1	4/24/2020	III. NPC Instructions for Populating Emails	Deletion: removed Regional Office phone number fills from Reminder Email (pages 6 and 7)
1	4/24/2020	V. DSD-CESPB Instructions for Creating Label files	Change to sections A and B: updated instructions to reflect actual production process (page 7)
1	4/24/2020	Attachment A	Change: updated email text to reflect new language (pages 10-12)
4	5/19/2020	Attachment A	Change: updated email text (pgs 10-12)
5	3/22/2022	Throughout Document	Changes: Updated Reminder rules, Help Desk Hours, Diary URL and email wording

I.   Overview of Procedure and Timeline

1. Respondents that provide an email address in the CAPI instrument during the Placement interview, and agree to use the online diary, will be sent a "Welcome" email approximately within 24 hours of the placement.
2. Respondents will be sent a "Reminder" email on the 8th day after placement.
3. NPC will receive two daily input files (Welcome emails and Reminder emails) from ADDP-CESB beginning July 5, 2022. The input files will be copied to \ADDP-SO_Share\ SHARED\IPSB-DSCOTONPC\CED\LSF Monday through Friday, before 10 am.
4. NPC-IPSB will begin using this specification for Welcome Emails beginning July 1, 2022. ADDP-CESB will provide the first Welcome Email file on July 5, 2022.
5. NPC-IPSB will begin using this specification for Reminder Emails beginning July 9, 2022. ADDP-CESB will provide the first Reminder Email file on July 11, 2022.

II.   General Instructions

1. Input files will be placed in the following shared directory:
    a. \\lt171oafs-oa03\DSD_SHARE\SHARED\IPSB-SCLSTONPC\CED\LSF\
2. The naming conventions for the input files will be:
    a. lsfwelcomeemaillist_mmddyyyy_v#.dat
    b. lsfreminderemaillist_mmddyyyy_v#.dat
    c. …where *v* is the version number for situations where files need to be resent to NPC from ADDP
3. DSD-CESPB staff will remove e-mail addresses with incorrect or incomplete formats and place a copy of the clean file in \CESB\Ceshared\CED_LSF\Email for ADDP-CESB to review.   DSD-CESB will maintain a master file of all emails for record keeping and follow-up purposes.
4. ADDP-CESB staff will review the email label file. After the review has been completed and any corrections are made, the file can be copied to the NPC-IPSB shared file directory.
5. Any undelivered emails will be directed to the mail-in database --- Census.CE.Helpdesk@census.gov.
6. Census.CE.Helpdesk@census.gov will be bcc'd on all emails sent by NPC. These emails will be stored in separate folders within the CE Help Desk inbox.
7. In the event of a failure not related to the file (i.e. incorrect layout, etc), the job will automatically run again the next day. In the event of a failure related to the file, ITSB will notify ADDP-CESPB staff and a new file will be provided.

III.   NPC Instructions for Populating E-mails

A. Welcome Email (see Attachment A for layout and content)

1. On the same day the files are received, send the e-mails from the address: Census.CE.Helpdesk@census.gov
2. In the From field the email address label should read "U.S. Census Bureau"
3. Send the emails to the respondents' email addresses stored in <EMAIL>
4. Fill the Subject line with: Welcome to the Consumer Expenditure Survey – How to start using your diary
5. Fill the body of the email with:

Dear CE Diary Household,

Welcome to the Consumer Expenditure Diary Survey! In this email, you will find all the information to help you get started.

Step 1   Click or tap on this link to go to your diary
https://respond.census.gov/diary

Step 2   Enter the username and password provided by your Census Field Representative.

Step 3   Select the date you are scheduled to begin your diary. Your diary's start date is **<START>.**

If you have any questions about filling out the diary, please refer to the user guide or feel free to contact your Field Representative.

We appreciate your time and effort and look forward to speaking with you again in about two weeks!

Sincerely,
U.S. Census Bureau

For additional help on filling out your diary, please contact your Census Field Representative.

For help logging in to your diary:
Contact our Help Desk at 877-744-1522 or Census.CE.Helpdesk@census.gov

Help Desk hours:
Monday – Friday, 8am – 5pm Eastern

When you call, please leave a message and a Census employee will respond within 24 hours. On weekends, please call your Field Representative for immediate assistance.

6. Fill the Diary Start Date (START) using the Welcome email input file (see General Instructions #2). Reformat from MMDDYYYY to Month, Day, Year. For example, if START = 10012019 then fill START with October 2, 2019.

B. **Reminder Email (see Attachment A for layout and content)**
1. On the same day the files are received, send the e-mails from the address: Census.CE.Helpdesk@census.gov
2. In the From field the email address label should read "U.S. Census Bureau"
3. Send the emails to the respondents' email addresses stored in <EMAIL>
4. Fill the Subject line with: A reminder about your Consumer Expenditure diary
5. Fill the body of the email with:

   Dear CE Diary Household,

   We want to thank you again for participating in the Consumer Expenditure diary. You can begin recording your Week 2 purchases. If you can't log in or have other questions about the diary, please refer to the following resources for assistance:

   To log into your diary, tap or click here https://respond.census.gov/diary

   For help logging into your diary, please contact our Help Desk toll free at (877) 744-1522 or Census.CE.Helpdesk @census.gov

   For guidance on filling out your diary, click here to refer to the user guide.

   For any other questions about the diary, please contact your Census Field Representative.

   Your cooperation makes a difference!

   Sincerely,
   U.S. Census Bureau

   Help Desk hours:
   Monday – Friday, 8am – 5pm Eastern

When you call, please leave a message and a Census employee will respond within 24 hours. On the weekend, please call your Field Representative for immediate assistance.

IV.   Input File Layout

DSD-CESPB will provide a flat ASCII file to NPC-ITSB containing the required data for each email. The layout of the flat ASCII file is below:

Variable Name	Description	Length	Start	Stop
CTRLNUM	Control Number	24	1	24
EMAILADDRESS	Email address	50	25	74
SITE	Regional Office	2	75	76
PLCEDAT1	Placement Date	8	77	84
START	PLCEDAT1 + 1	8	85	92

V.   DSD-CESPB Instructions for Creating Label Files

A. Welcome Email Label File
i.   ADDP-CESB will create a daily ascii file for each Regional Office (rosco_RO#_capistatus_interperiod_MMDD.txt) from ROSCO. The files will be stored here: \CESB\Ceshared\CED_LSF\Email\YYYYMM

ii.   DSD-CESPB will create a file --- lsfwelcomeemaillist_mmddyy_v#.txt --- only including records where INSTAT1 = 201 and DIARY_MODE = 2 (online diary placed) and EMAILADDRESS is not empty.

iii.   Format of START variable is MMDDYYYY

iv.   Records should be eliminated from the resulting label file with the following logic: If CNTRLNUM was included in a previous label file, then delete.

v.   Records should be eliminated if EMAILADDRESS does not contain the following: @ or .com, .net or .gov or .org….

vi.   ADDP-CESB will review "bad" emails and apply corrections when appropriate

vii.   DSD-CESPB will maintain a master file

B. Reminder Email Label File
i.   DSD-CESPB will create a file --- lsfreminderemaillist_mmddyy_v#.txt --- only including records from master where welcome=1 and good=1.

ii.   Records should be eliminated from the resulting label file with the following logic: If CNTRLNUM was included in a previous label file, then delete.

VI.   Planning, Review and Testing

- ADDP expects roughly 7 – 10 email addresses / records per file delivery
- Prior to delivery, ADDP will perform QA on each file to ensure it is in the correct format

VII.   Contacts

Branch	Name	Phone
NPC-ITSB	Sherry Bowman	8-2272
NPC-ITSB	Hai Nguyen	8-2469
NPC-ITSB	Jennifer L. Simpson	8-2516
DSD-CESPB	Dong Guan	3-5332
DSD-CESPB	Jennifer Peterson	3-3398
DSD-CESPB	Nga Nguyen	3-2572
ADDP-CESB (Primary)	Samantha Cole	3-9886
ADDP-CESB	Mika Kousha	3-6170
ADDP-DSCO	Dan Eklund	8-3301

Attachment A --- Welcome and Reminder Emails

Email Type: Welcome
Audience: All Online Diary households that provide an email address at placement in the CAPI instrument
Distribution: National Processing Center
Timing: Generally, within 24 hours of diary placement
Font size and style: Segoe UI, 12 font size
Email Text:

Subject: Welcome to the Consumer Expenditure Survey – How to start using your diary

Dear CE Diary Household,

Welcome to the Consumer Expenditure Diary Survey! In this email, you will find all of the information to help you get started.

Step 1	Click or tap on this link to go to your diary https://respond.census.gov/diary
Step 2	Enter the username and password provided by your Census Field Representative.
Step 3	Select the date you are scheduled to begin your diary. Your diary's start date is **<START>.**

If you have any questions about filling out the diary, please refer to the user guide or feel free to contact your Field Representative.

We appreciate your time and effort and look forward to speaking with you again in about two weeks!

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<u>Help Desk hours:</u>
Monday – Friday, 8am – 5pm Eastern

When you call, please leave a message and a Census employee will respond within 24 hours. On the weekend, please call your Field Representative for immediate assistance.

Email Type: Reminder
Audience: Online Diary households who provided a valid email address
Distribution: National Processing Center
Timing: 8 days after placement
Font size and style: Segoe UI, 12 font size
Email Text:

Subject: A reminder about your Consumer Expenditure diary

Dear CE Diary Household,

We want to thank you again for participating in the Consumer Expenditure diary. You can begin recording your Week 2 purchases. If you aren't able to log in or have other questions about the diary, please refer to the following resources for assistance:
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