# 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:
  + IF INTNMBR=3 AND QTYPE=2, then display “Worksheet eligible“
  + 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 | * 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 | 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).  Blank = normal interview  2 = CEQW – eligible to receive the CEQ Worksheet  This flag should NOT be copied to spawns but should be carried forward throughout the case’s time in sample. |
| SCIF | CEQW\_FLG | Set during post-processing for 3rd interview cases in 201807-201809 with QTYPE=1 and CEQWOFFR=1 | n/a | 1 = CEQ Worksheet provided  Blank = all other situations  This flag should NOT be copied to spawns but should be carried forward to the case’s 4th/final interview. |

**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 | **Since the first of ^REF\_MONTH, have ^YOU\_ANYMEM had any expenses that will be reimbursed or deducted as business expenses?**   1. Yes 2. No   Skip instructions:  1,DK,RF: Goto BUSXPNSE  2: Exit block and goto BSECT01 | **Since the first of ^REF\_MONTH, have ^YOU\_ANYMEM had any expenses that will be reimbursed or deducted as business expenses?**   1. Yes 2. No   Skip instructions:  1,DK,RF: Goto BUSXPNSE  2: **IF CEQW\_FLG=1 goto CEQW\_REV**  **ELSE** Exit block and goto BSECT01 |
| CEINTRO | BUSXPNSE | Update skip instructions due to test questions for CEQ Worksheet | **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.**   1. Enter 1 to continue   Skip instructions:  Exit block and goto BSECT01 | **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.**   1. Enter 1 to continue   Skip instructions:  **IF CEQW\_FLG=1 goto CEQW\_REV**  **ELSE** Exit block and goto BSECT01 |
| CEINTRO | CEQW\_REV | New FR question to ask if the worksheet was provided in the previous/3rd interview (CEQW\_FLG=1 ) | n/a | \* Are you currently talking to the respondent in person or by phone?   1. In person 2. By phone   Skip instructions: 1: goto CEQW\_OBS  2: goto CEQWDHAV |
| 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 | \* Does the respondent have the CEQ Worksheet provided last quarter available?   1. Yes 2. No   Skip instructions  1: goto CEQW\_HAV  2: goto CEQWDHAV |
| CEINTRO | CEQW\_HAV | New question on whether the respondent used the Worksheet | n/a | **I see that you have the worksheet that I provided at the last interview. Did you use it?**   1. Yes 2. No   Skip instructions:  1: goto CEQW\_REF  2, DK, REF: goto CEQWNUSE |
| CEINTRO  **updated 8/18/17** | CEQWDHAV | New question to ask respondent on Worksheet if FR does not see it available (CEQW\_OBS=2)  8/18/17:  Updated skip instructions by moving the going to CEQ\_PHN if CEQW\_REV=2 to the ‘yes’ (1) response | n/a | **At the last interview, I left a worksheet for you to help you get ready for this interview. Did you use it?**   1. Yes, 2. No   Skip instructions:  1: IF CEQW\_REV=2 goto CEQ\_PHN ELSE goto CEQW\_REF  2, DK, REF: goto CEQWNUSE |
| CEINTRO | CEQW\_PHN | New respondent question on Worksheet if interview is conducted by phone and respondent indicated using worksheet | n/a | **Do you have it available for our interview today?**   1. Yes 2. No   Skip instructions:  1: goto CEQW\_REF  2, DK, REF: CEQWNUSE |
| CEINTRO | CEQW\_REF | New question on Worksheet – reminding respondent to use during interview | n/a | **If you could keep the worksheet out, it will be helpful to reference as we go through the interview.**   1. Enter 1 to continue   Skip instructions:  Exit block and goto BSECT01 |
| 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 | **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.**   1. Enter 1 to continue   Skip instructions:  Exit block and goto BSECT01 |

**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 | **In thinking about the length of today's survey, would you say that it was...**   1. **Very short?** 2. **Somewhat short?** 3. **Neither short nor long?** 4. **Somewhat long?** 5. **Very long?**   Skip instructions:  Exit BResearch block and goto DK\_CHECK | **In thinking about the length of today's survey, would you say that it was...**   1. **Very short?** 2. **Somewhat short?** 3. **Neither short nor long?** 4. **Somewhat long?** 5. **Very long?**   Skip instructions:  **IF CEQWNUSE=1 GOTO CEQW\_NO**  **ELSEIF CEQW\_REF=1 GOTO CEQWEASY**  **ELSE** Exit BResearch block and goto DK\_CHECK |
| BACK (Research block) | CEQW\_NO | New question to ask if CEQWNUSE=1 (respondents did not use worksheet) | n/a | **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?**   * Enter all that apply, separate with commas  1. Too much work 2. Too busy 3. Privacy concern 4. Doesn’t understand the purpose of the worksheet 5. Other, specify   Skip instructions: IF 5selected,: goto CEQWNOSP  ELSE goto CEQWCOMM |
| BACK (Research block) | CEQWNOSP | New specify question if 5 selected in CEQW\_NO. | n/a | \* Specify:  Skip instructions  goto CEQWCOMM |
| BACK (Research block) | CEQWEASY | New question to ask if CEQW\_REF=1 (respondents used worksheet) | n/a | **I’m going to ask you a few questions about the worksheet.**  **Did you find the Worksheet easy or difficult to fill out?**   1. Easy 2. Difficult   Skip instructions: goto CEQWBUR |
| BACK (Research block) | CEQWBUR | New question on Worksheet | n/a | **How long do you think you spent filling the worksheet out?**   * Enter number of minutes   Skip Instructions:  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?**   1. Yes 2. No   Skip instructions:  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?**   1. Yes 2. No   Skip instructions:  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?**   1. Yes 2. No 3. Unsure/DK   Skip instructions:  goto CEQWCOMM |
| BACK (Research block) | CEQWCOMM | New question on Worksheet | n/a | **Do you have any suggestions on how we could improve the Worksheet?**   1. Yes 2. No   Skip instructions: 1: goto CEQW\_SP 2, DK, RF: goto DK\_CHECK |
| BACK (Research block) | CEQW\_SP | New question on Worksheet | n/a | **What are your suggestions?**  Skip instructions:  goto DK\_CHECK |
| BACK | THANKYOU | Update skip instructions to account for offering worksheet to 3rd 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.  Skip instructions:  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.  Skip instructions:  **IF INTNMBR=3 and QTYPE=2 goto CEQW\_1**  **ELSE**IF INTNMBR = 1-3 then goto QTRAPPT  ELSE goto HOW\_INTV |
| BACK | CEQW\_1 | 7/21/2017:  New question for 3rd 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 4th interview.  Are you currently talking to the respondent in person or by phone?   1. In person 2. By phone   Skip instructions:  1: goto CEQW\_BEN  2: goto QTRAPPT |
| BACK | CEQW\_BEN | 7/21/2017:  New question for 3rd interviews with QTYPE=2 to be asked of completed interviews | n/a | \* Do you believe this respondent would benefit from the use of a CEQ Worksheet?  If you do not have the CEQ Worksheet available to give to the respondent, enter No.   1. Yes 2. No   Skip instructions: 1: go to CEQWOFFR 2: go to QTRAPPT |
| BACK  **Updated 8/18/17** | CEQWOFFR | 7/21/2017:  New question about receiving the worksheet (if CEQW\_BEN=1)  8/18/2017:   * Updated “store instructions” to “posts-processing store instructions” * In skip instructions, changed variable name ‘CEQW\_REF’ to ‘CEQW\_RF’ | n/a | \* Show the worksheet to the respondent  **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?**   1. Yes 2. No   Post-processing store instructions:  IF CEQWOFFR=1 then set CEQW\_FLG=1.  Skip instructions: 1: goto QTRAPPT 2: go to CEQW\_RF |
| BACK  **Updated 8/18/17** | CEQW\_RF | 7/21/2017:  New question for respondents who do not want the worksheet  8/18/2017:   * Updated skip instructions to reflect ‘select all that apply’ aspect. * Changed variable name ‘CEQW\_REF’ to ‘CEQW\_RF’ | n/a | **Can you tell me why you prefer not to use the Worksheet?**   * Enter all that apply, separate with commas.  1. Not interested 2. Seems like too much work 3. Too busy 4. Privacy concern 5. Other, specify   Skip instructions: If 5 selected then goto CEQW\_RFS  ELSE goto QTRAPPT |
| BACK  **Updated 8/18/17** | CEQW\_RFS | 7/21/2017:  Specify question if ‘Other, specify’ is selected in CEQW\_RF  8/18/17:  Changed variable name from CEQ\_REFS to CEQW\_RFS | n/a | \* Specify:  Skip instructions:  goto QTRAPPT |
| BACK  **Updated 8/18/17** | HOMEFILE | 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  8/18/2017:  Changed follow-up variable name to ‘NOBEN’ (for if CEQW\_BEN=2) | * Did you give the respondent a Home File this quarter?  1. Yes 2. No   Skip instructions:  goto INFOBOOK | * Did you give the respondent a Home File this quarter?  1. Yes 2. No   Skip instructions:  **IF CEQW\_BEN=2 goto NOBEN**  **ELSE** goto INFOBOOK |
| BACK  **Updated 8/18/17** | NOBEN | 7/21/2017:  FR question for those that indicated that they didn’t think the respondent would benefit from the worksheet (CEQW\_BEN=2)  8/18/17:  Changed variable name from ‘CEQ\_NO’ to ‘NOBEN’ | n/a | \* Why do you think this respondent wouldn’t benefit from the use of a worksheet?  Enter all that apply, separate with commas.   1. Good rapport not built 2. Concerned about privacy 3. Distrusts government 4. Hesitant to participant in next interview 5. Did not have worksheet available 6. Other, specify   Skip instructions: 1-5, DK, RF: goto INFOBOOK  6: Goto NOBENSP |
| BACK  **Updated 8/18/17** | NOBENSP | 7/21/2017:  New variable if ‘Other, specify’ selected in CEQW\_NO  8/18/17:  Changed variable name from ‘CEQW\_NOSP’ to ‘NOBENSP’ | n/a | \* Specify:  Skip instructions:  Goto INFOBOOK |