

# Finding the Value of Electronic Records in the CE

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# A New Opportunity for Records Use

## ■ Current CE:

- ▶ One interview per wave
- ▶ Encouragement in the advance mailing and during the interview that information can be found on records

## ■ Redesigned CE:

- ▶ Two interviews separated by one week
- ▶ New opportunity at Visit 1 to encourage records collection in preparation for Visit 2



# Instructing Respondents to Collect Electronic Records

- Focus on electronic records
- Goal 1: Collect primary records wherever possible (rather than secondary records)
- Goal 2: Store them in a systematic way that will make it easy to find records during the interview

# Methods

- 20 participants
  - ▶ Screened for regular use of electronic records
  - ▶ Paid \$80
- Three-part lab study
  - ▶ Lab visit 1: Instructions
  - ▶ Homework: Collect records at home, take notes
  - ▶ Lab visit 2: Feedback on the process and share descriptions of what records were collected


# Instructions (version 1)

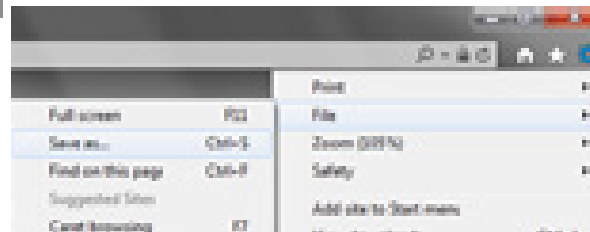
*For online accounts:*

Click on a link or icon like this to download a PDF of the record.



Save the PDF to the “Records Interview” folder you just created. Give the file a name that will help you to find it – like, “Electricity June” or “Creditcard July”.

Or you can click on  or Tools > File > Save as to open a menu. Or, use your mouse to right-click anywhere on the screen. Be sure to select “Webpage, complete (\*.htm; \*.html).”




# Instructions (version 2)


## *To download a PDF:*

Click on a link to a PDF or an icon like this to download a PDF of the record.



In some browsers, you can click on  or Tools > File > Print and then choose to Save as a PDF.

## *To save a webpage:*

Click on  or Tools > File > Save As or use your mouse to right-click anywhere on the screen. Be sure to select “Webpage, complete (\*.htm; \*.html).”

Save the files to the “Records Interview” folder you just created. Give each file a name with the expense category or a description to help you find the expenses, like “MedicalCare June”.

# Instructions (version 3)

## *Tips for downloading records:*



View a PDF by clicking on a link or icon like this one. Save or download the PDF.

If the record is not a PDF, you may be able to:

- Click on a ☰ menu in the upper right corner of your browser, and choose Print and Save as PDF
- Use the menu bar across the top of your browser to click on File > Print and then choose to Save as PDF.

Alternatively, you may be able to:

- Use your mouse to right-click anywhere on the screen and select Save As.
- Use the menu bar to select File > Save As.

In the window that pops up, be sure to select the option: "Webpage, complete (\*.htm; \*.html)."

Save the files to the "Records Interview" folder you just created. Give each file a name with the expense category or a description to help you find the records later, like "MedicalCare June".

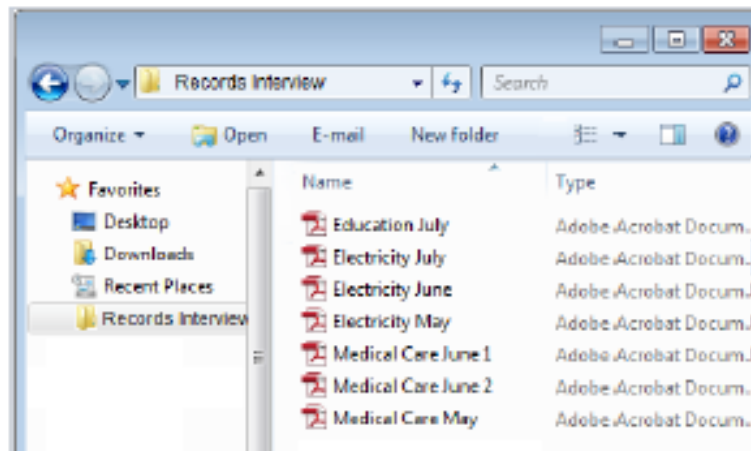
# Instructions (version 4)

## *Tips for downloading records*

**Save records for offline access:** Getting organized now can save time during the interview and ensure your records are ready even if your internet connection is slow or stops working.

**Save in PDF format:** For most records, PDF is the easiest format to use.

**Name your files with the expense and month:** These labels will help you to find the records quickly during the interview. Here is an example:





# Types of Records Collected

<b>Expense</b>	<b>Had expense</b>	<b>Electronic record</b>	<b>Primary record</b>	<b>Secondary record</b>
Mortgage	6	6	3	3
Rent	13	10	0	9
Vehicle maintenance	8	6	1	4
Internet	14	14	8	4
Medical services	10	9	4	5
Health insurance	13	12	12	0

# Process of Collecting Electronic Records

- Strong preference to log-in as needed rather than download in advance
  - ▶ Nature of online records
  - ▶ Excessive burden
  - ▶ Smartphones
- Range of website designs
  - ▶ Designed for the business-consumer relationship

# Organizing Electronic Records

- File location
  - ▶ Default download folder
  - ▶ Create new folder
- File names
  - ▶ By company name
  - ▶ By item category
  - ▶ By month

# Browser Instructions

- Instructions have to be simple enough for interviewers to explain and troubleshoot
- Accommodate different browsers and versions
- Level of respondent tech knowledge



# Redefine the Task of Electronic Records Collection

- Acknowledge that:
  - ▶ Electronic records can be difficult to collect
  - ▶ Primary records would provide superfluous detail for many expenses
  - ▶ Using a record (electronic or not) for every expense would take a lot of interview time
- Simplify the task:
  - ▶ Encourage secondary records for most expenses; select only a handful for which primary records would greatly increase data quality

# Redefine the Use of Electronic Records in the Interview

- Accurate source of expenditure information
  - ▶ Secondary records may not have the detail
- Memory cue for forgotten expenditures
  - ▶ Secondary records can provide potentially good coverage of a household's expenses
- Relying on both electronic and paper for the foreseeable future

# Future Challenges for Record Use

- Use of secondary records during the interview
- Organization of records
- Reducing amount of interview time required to use records
- Incomplete records collection



# Contact Information

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