

Screenener

Group 6 - My SFP

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PARTICIPANT QUOTAS (Common Table)

	8 participants
Gender:	No quota but ideally a mix.
Current status	All should be UT Austin students.
Age:	Mix: 5 [Undergraduate] 3 [Graduate]
Your primary experience: Looking for a mix of experiences with [what your app/website is offering]	Mix: 4 [have experience in the online financial aid application process in 2 years.] 4 [have little to no experience in the online financial aid application process in 2 years]
Your secondary experience: Looking to get at least 2-3 participants who also [2ndary experience, or shared experience]	2 [have experience with using websites to apply for financial aid/scholarships] 2 [have little to no experience with using websites to apply for financial aid/scholarships]
Overall App/web similar experience:	Mix: 4 [experts using funding applications include banking apps] 4 [novices using banking app]
Smartphone and App use & Technical ability:	• Ensure that either Firefox, Chrome, or Safari is installed on both your computer and smartphone. • A reliable and high-speed Internet connection is essential for the tech-check and the actual interview session. • Familiarity with video conferencing apps (e.g., Zoom, Google Hangouts, Skype, FaceTime, etc.) on both your computer and smartphone is a prerequisite.

Exclusions:	Screen out participants anyone who has participated in product testing/ research for the SFP portal in the last 6 months. Screen out individuals with prior employment experience at UT Austin, other universities or colleges (competitors), especially in financial aid-related departments or finance-related industries.
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Objective of Study

The purpose of this study is to gather reactions and feedback to the new UT Austin financial aid platform - the SFP portal. All participants must be UT Austin students. Participants will be divided into between those who have experience in the online financial aid application process, and 50% have little to no experience with applying financial aid. Sessions will be conducted via Zoom (or other online meeting platform if you prefer) for the convenience of participants.

Participant Logistics and Requirements

- The session will take approximately 30-45 minutes of the participants time.
- Participants will be required to participate in a 10 minute tech-check the day before testing week. If the recruit cannot efficiently demonstrate usage of the applications on their computer and mobile phone, they will need to be replaced.
- Participants must be open to signing consent and NDA agreement prior to their participation, granting permission for video recording / photography during the session, and preventing sensitive information from being shared with others.
- Participants should not have taken part in product testing or research for the SFP portal within the last 6 months, and they should not be employed in any of the restricted industries.

Recruiter Introduction

Hello, my name is _____, from the School of Information. We are conducting a research project and would like to include your thoughts on the new financial aid portal. This study requires up to 30-45 minutes of your time. You will be asked to sign an NDA agreement before we start, and will be recorded through the process. All your answers will be kept confidential and presented anonymously.

Questionnaire

A. Demographics

1. What is your gender?

RECRUITER NOTE: RECRUIT A MIX

☐ Male

☐ Female

2. What school do you attend?

☐ University of Texas at Austin

☐ Others **TERMINATE**

3. Which year are you currently in?

☐ Freshman

☐ Sophomore

☐ Junior

☐ Senior

☐ First year Master's

☐ Second year Master's

☐ Other

☐ Graduated **TERMINATE**

B. Employment

1. Which department are you in? Ans: _____

2. Do you have job experience?

☐ Yes

☐ No

3. Can you tell me where you're currently or previously employed (part-time jobs) ?

Ans: _____

☐ UT Austin departments other than financial related

☐ UT Austin financial related department **TERMINATE**

☐ Any universities or colleges that have financial aid system **TERMINATE**

☐ Any finance industry job **TERMINATE**

C. Financial Aid Portal Usage Questions

1. Have you ever used the current Financial Aid portal (aka CASH)?

☐ Yes

☐ No **JUMP to Financial Applications Usage Questions(Section D)**

2. When was the last time you used the financial aid/CASH portal?

☐ this past month

☐ this semester

☐ last semester

☐ 1 year ago

☐ 2 years ago **TERMINATE**

3. What are your primary goals when using a student financial portal?
 - ☐ applying for FAFSA
 - ☐ applying for scholarships
 - ☐ view financial aid information
 - ☐ other: _____
4. What devices do you prefer to access your financial information on?
 - ☐ Laptop
 - ☐ Desktop
 - ☐ Mobile Phone
 - ☐ Others
5. Have you ever participated in the research or testing of the new financial aid portal - the SFP portal in the last 6 months?
 - ☐ Yes **TERMINATE**
 - ☐ No

D. Financial Applications Usage Questions

1. Have you ever used a financial related application?
 - ☐ Yes
 - ☐ No
2. What are the financial apps that you usually use? Ans: _____
3. How often do you use the financial apps?
 - ☐ Once a week
 - ☐ More than once a week
 - ☐ Once a month
 - ☐ A few times a month
 - ☐ Other, please specify: _____
4. What are your primary goals when using a financial app?

E. Technical Proficiency

1. What type of device are you most comfortable using when accessing websites?
 - ☐ Laptop or desktop computer
 - ☐ Smartphone
 - ☐ Tablet/iPad
 - ☐ Other, please specify: _____
2. Which web browser do you have installed on your computer?

RECRUITER NOTE: Must select at least one

 - ☐ Safari
 - ☐ Chrome
 - ☐ Firefox
 - ☐ Other, please specify: _____

Invitation To Participate/ Scheduling

Some of the sessions will be conducted via Zoom, and you will be required to screen share so that we can observe your interactions with the financial aid system.

Respondents must consent to all the study's conditions outlined below.

Dear _____,

We are conducting a research/interview to increase our understanding of the usability of the upcoming UT financial aid portal, and we are very interested in your opinions and reactions.

We would like you to participate in this study,

[] The usability test takes around 30-45 minutes and is very informal. Your responses to the questions will be kept confidential.

[] You will be asked to sign an NDA agreement before we start, and will be recorded through the process. Each interview will be assigned a number code to help ensure that personal identifiers are not revealed during the analysis and write up of findings.

[] There is no compensation for participating in this study. However, your participation will be a valuable addition to our research and findings could lead to significant improvements for the future financial aid portal.

If you are willing to participate please suggest at least 3 (three) days and times that suit you and we'll do our best to be available. If you have any questions please do not hesitate to ask.