



Web-Based Screener

Thank you for your interest in participating in user experience studies at **Fors Marsh Group**. We are currently seeking individuals that [targeted audience description]. For this study, participants will interact with a website and provide feedback on their experience. One-on-one interviews will take place at our [location placeholder text] from [start date] to [end date], and will be 60-minutes long. Compensation (\$75 in the form of a check) will be provided to those who participate.

Paperwork Reduction Act Statement [[Link to new window](#)].

[Paragraph below in the new window]

Paperwork Reduction Act

According to the Paperwork Reduction Act of 1995, an agency may not conduct or sponsor, and a person is not required to respond to a collection of information unless it displays a valid OMB control number. The OMB control number for this collection is 3170-0024. It expires on 12/31/2015. The time required to complete this information collection is estimated to average approximately 5 minutes per response, including the time for reviewing any instructions, searching existing data sources, gathering and maintaining the data needed, and completing and reviewing the collection of information. Responding to this collection of information is voluntary. Comments regarding this collection of information, including the estimated response time, suggestions for improving the usefulness of the information, or suggestions for reducing the burden to respond to this collection should be submitted to Bureau at the Consumer Financial Protection Bureau (Attention: PRA Office), 1700 G Street NW, Washington, DC 20552, or by email to PRA@cfpb.gov.

[Paragraph below included]

Privacy Act Statement

5 U.S.C. 552(a)(e)(3)



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The information you provide through your responses to Fors Marsh will assist the study sponsor, the Consumer Financial Protection Bureau (“CFPB”), in evaluating a prototype website that has financial information.

The CFPB will not obtain or access any directly identifying information from Fors Marsh about study participants. The agency will only obtain and access de-identified results and aggregated analyses of those results.

Information collected on behalf of the Bureau by Fors Marsh will be treated in accordance with the System of Records Notice (“SORN”), [CFPB.021 – CFPB Consumer Education and Engagement Records, 77 F.R. 60382](#). This information will not be disclosed as outlined in the Routine Uses for the SORN. Direct identifying information will only be used by Fors Marsh to facilitate the study and will be kept private except as required by law.

This collection of information is authorized by Pub. L. No. 111-203, Title X, Sections 1013 and 1022, codified at 12 U.S.C. §§ 5493 and 5512.

Participation in this study is voluntary, you are not required to participate or share any identifying information with Fors Marsh, including name and email address, and you may withdraw participation at any time. However, if you do not include the requested information, you may not participate in the study.

Thank you for your interest.

[The gray highlighted questions are standard FMG questions]

Q1. First name: [Text box] Last name: [Text box]

Q2. Email [Text box]

Q3. Mobile number: [Text box]

Q4. Alternate number: [Text box]

Q5. Date of birth: [Text box]

Q6. What is your gender?

1. Male
2. Female

Q7. Are you Hispanic, Latino, or Spanish origin?

1. No, not of Hispanic, Latino, or Spanish origin
2. Yes, Hispanic, Latino, or Spanish origin



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Q8. Please select all of the following that best describes your race:

1. White
2. Black or African American
3. American Indian or Alaska Native
4. Asian
5. Native Hawaiian or Other Pacific Islander

Q9. Please select all languages that you're fluent (can speak, read, and write) in

1. English
2. Spanish
3. Chinese Mandarin
4. Japanese
5. Vietnamese
6. Korean
7. Taglog
8. Russian
9. Arabic
10. Haitian Creole

Q10. What city and state do you live in? **[Text box]**

Q11. Do you currently have or have you ever had or used a: *(Select all that apply)*

1. Mortgage
2. Student loan
3. Credit card
4. Personal bank account/checking account
5. Money transfer service
6. Other personal loan

Q12. What best describes your current occupation? **[Check boxes, select all that apply]**

1. Going to high school
2. Going to community college, 2-year degree program, or trade school (either full-time or part-time)
3. Going to a 4-year college/university (either full-time or part-time)
4. Working full-time
5. Working part-time
6. Homemaker
7. Retired
8. Not employed **[Terminate]**



- Q13. What is the highest educational degree that you have earned? **[Radio buttons, select only one]**
1. Less than high school degree or equivalent
 2. High school graduate (grade 12, diploma, or GED)
 3. Trade school certificate
 4. Some college courses completed
 5. Graduated with a 2 year degree (Associates)
 6. Graduated with a 4 year degree (Bachelors)
 7. Some graduate school courses completed
 8. Graduated with a post-graduate degree
- Q14. What industry do you work in? **[Text box]**
- Q15. What is your job title? **[Text box]**
- Q16. What devices do you usually use for work and personal use: **[Select all that apply]**
1. Desktop Mac
 2. Desktop PC
 3. Laptop Mac
 4. Laptop PC
 5. Tablet [what kind]
 6. Mobile phone [what kind]
- Q17. What is your annual household income? **[Radio buttons, select only one]**
1. Less than \$30K
 2. \$30K - \$50K
 3. \$50K - \$100K
 4. \$100 - \$150K
 5. More than \$150K

[If eye tracking: instructions and Q18, Q19] This study includes eye tracking which will allow researchers to see where participants look on the screen. We will ask you a couple of questions related to this.

- Q18. Do you require glasses for reading? **[Radio buttons, select only one]**
1. Yes **[Continue]**
 2. No **[Skip to Q20]**
- Q19. Can you wear contacts to the session rather than glasses? **[Radio buttons, select only one]**
1. Yes **[Continue]**
 2. No **[Terminate]**
- Q20. How did you hear about research opportunities with us?
1. Google



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2. Facebook
3. Washington Post online
4. Washington Post paper
5. Express newspaper
6. Craigslist.org
7. Restaurants or Cafes in Ballston (e.g., Starbucks, Panera, Buzz Bakery)
8. Friend or Family
9. Other [Text box]

Thank you for completing this survey. If you qualify for this study, a user experience team member will contact you to schedule a time that is convenient for you. If you have any questions please contact us at ux@forsmarshgroup.com or call us at 571-858-3817. You can also visit our website at www.forsmarshgroup.com or our Facebook page www.facebook.com/ForsMarshGroup.

Phone-Based Screener (for those who qualify based on web-based screener)

Hello _____. Thank you for your interest in participating in user experience studies at Fors Marsh Group. My name is _____ and I wanted to follow up regarding a web-based screener that you completed recently for an upcoming study about a website. I wanted to ask a couple more questions and see if we can schedule you. Your participation is completely voluntary. Do you have a few minutes?

- Q1. Can you please verify your age?
- Q2. What is your current occupation?
- Q3. You had indicated in the questionnaire that you currently have, have had or used a **[Insert response from Q11]**. Would you tell me a little about your experience with that financial product or service?

[Open ended. Terminate if responses are inconsistent with web screener]

Invitation:

We would like to invite you to participate in our study. We will show you a financial website and ask you to complete tasks using the website. The entire interview should last about an hour, and you will be paid \$75 in the form of a check when you are done. Would you be willing to participate in this study?

Reconfirm participant's email address.



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Terminate message: both for web and phone screener

We are sorry but you do not qualify for this study. Would you like us to contact you for future studies that you qualify for? **[Radio buttons, select only one]**

1. Yes

2. No