

# Direct Express Mobile App Usability Testing Screener

## Recruiting Specifications

- Complete a total of 12, 60 min. one-on-one lab sessions over the course of 2 days
  - o 7 Sessions with General participants
  - o 2 Sessions with Disabled participants
  - o 3 Sessions with Representative Payee participants
- Recruit 2 participants with equal criteria for the same session time slot however only 1 will be selected to participate.
- Recruit to specified criteria & quotas

## Recruiting Criteria

- Recruits will be recipients or representative payees of Federal Government Benefits via prepaid card **(Direct Express prepaid account cardholders)**.
- All recruits will have some digital fluency / minimal mobile savviness ability.
- If possible, recruit ½ male and ½ female for each segment, **recruit to best fit to criteria & quotas**
- Recruit General Population participants above 36 years of age
- Recruit Disabled participants between 21 – 55+ years of age
- Recruit for Representative Payee sessions as follows: one session for 18-21 years of age and one session for 36 – 65 years of age
- None will work or have family members work in marketing, public relations, banking (including credit & prepaid cards), and computer or technology industries.
- None will have participated in a market research study in the past 6 months
- All recruits must be **iPhone/Samsung Phone users.**

## Tentative Schedule

	<b>January x1</b>	<b>January x2</b>
	<b>iPhone Users</b>	<b>Samsung Phone Users</b>
<b>9:00 – 10:00AM</b>	General Population	General Population
<b>10:30 – 11:30AM</b>	General Population	General Population
<b>12:00 – 1:00PM</b>	Disabled	Disabled
<b>LUNCH</b>		
<b>2:00 – 3:00PM</b>	Rep Payee	General Population
<b>3:30 – 4:30PM</b>	General Population	General Population
<b>5:00 – 6:00PM</b>	Rep Payee	Rep Payee

NOTE: The strategy behind this schedule is to ensure a mix of participant segments each day, this way those who are not able to attend both days can observe the full range of segments in one day.

**A. PRE-QUALIFYING INFORMATION for Direct Express Cardholders**

Hello. My name is \_\_\_\_\_ with Lucas Research, an independent market research company. I am calling on behalf of the Master Card® and U.S. Department of the Treasury regarding a consumer study with **Direct Express®** cardholders. May I speak with \_\_\_\_\_?

This is NOT a sales call. We're looking to recruit existing Direct Express cardholders to take part in a consumer research study regarding new functionality to the Direct Express Card Program. The study is for research purposes only and is not a solicitation for business or an attempt to sell you anything now or as a result of this study.

The study will consist of individual interviews to evaluate the value of having a prepaid card with a companion mobile App to help people manage their money.

If you qualify for the study, you will be asked to participate in an interview that will last about one hour and you will be paid for your time and participation.

The interviews will take place **January x1** and **x2**.

Are you interested in proceeding further?

- Yes .....  Continue.
- No .....  Thank you. Terminate.

Q1. Name: \_\_\_\_\_

**NOTE: Indicate GENDER....**

- Male .....
- Female .....

**RECRUIT 50/50 MIX**

Q2. Do you or does anyone in your household work for one of the following types of Companies/Professions? (**READ and CHECK ANY THAT APPLY. SEE NOTE.**)

- A market research company .....
- An advertising agency or public relations firm .....
- A financial institution such as a bank, insurance company, brokerage firm  
Or credit card / prepaid card company .....
- Computer Software or Hardware, Computer Services  
Organization / Department / Company .....

**NOTE: IF YES TO ANY, TERMINATE.**

Q3. Have you ever participated in a market research discussion group/interview?

- Yes .....  CONTINUE
- No .....  SKIP TO Q5

Q4. When was the last group discussion or interview you participated in? (DO NOT READ LIST.)

Less than 6 months ago.....  **TERMINATE**

6 months ago or longer.....  **CONTINUE**

Q5. What is your age? (**READ AND RECORD**)

Under 18 years of age.....  **TERMINATE**

18 to 21 years of age.....

22 to 25 years of age.....

26 to 35 years of age.....

36 to 45 years of age.....

46 to 55 years of age.....

56 to 65 years of age.....

Over 65 years of age.....

Q6. Which of the following devices do you own or use on a regular basis? (**READ AND RECORD**)

A desktop or laptop computer.....

A tablet.....

A smartphone.....

Don't own or use mobile devices.....  **TERMINATE**

Q7. What brand and type of Smartphone do you use most regularly? (**READ AND RECORD**)

Apple iPhone.....

4/4S.....

5/5S.....

6/6Plus.....

Android (e.g., Samsung, HTC, LG, etc.).....

Samsung S3.....

Samsung S4.....

Samsung S5.....

HTC, LG, Other.....  **TERMINATE**

Blackberry.....  **TERMINATE**

Other.....  **TERMINATE**

**NOTE: PLEASE RECRUIT FOR iPhone /Samsung phone users ACROSS SEGMENTS**

**B. FEDERAL BENEFIT RECIPIENT PARTICIPANT**

As mentioned before, we are looking for Direct Express cardholders who receive federal benefits of their own or manage benefits for someone else.

In the next set of questions, we are interested in learning more about the types of federal benefits received.

- Q8. How long have been a recipient of federal benefits or oversaw someone else's federal benefits?
- Less than 6 months
  - more than 6 months to 1 year
  - more than 1 year to 3 years
  - more than 3 years
  - more than 5 years
  - more than 10 years

**Note : No more than 2 participants with less than 6 months**

- Q9. Do you receive federal benefits or are you the person that oversees someone else's federal benefits?
- Receive Benefits .....  **Go to Q11**
  - Oversee someone else's benefits .....  **Go to Q10 Categorize as Representative Payee**

- Q10. Who is the recipient whose federal benefits you manage/oversee? **(READ AND RECORD)**
- My parent.....
  - My child.....
  - A family member.....
  - A patient/resident in a home.....
  - Other.....  \_\_\_\_\_

- Q11. Are the federal benefits received the result of a disability?
- Yes.....  **Go to Q12 Categorize as Disabled**
  - No .....  **Go to Q13 Categorize as General Population**

- Q12. What type of impairment(s) made the recipient eligible for federal benefits?

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**NOTE: PLEASE RECRUIT A MIX - SKEW ON VISION DIFFICULTY & HAND FUNCTION IMPAIRMENTS**

**Recruit 4 Rep Payee:** 2 (for 2 iPhone sessions) and 2 (for 1 Samsung phone session)

**Recruit 6 Disabled:** 4 (for 1 iPhone session) and 2 (for 1 Samsung phone session)

**Recruit 14 General Pop:** 7 (for 2 iPhone sessions) and 7 (for 2 Samsung phone sessions)

**CONTINUE to SECTION C**

**C. DEVICE USAGE**

As mentioned before, we want to have people evaluate the value of having a Prepaid Card and a companion mobile App that can help them manage their money/benefits received.

Earlier you mentioned that you use an iPhone/Samsung phone. In the next set of questions, we are interested in learning more about how you use your mobile phone.

Q13. On average, how frequently do you spend time doing the following activities with your Smartphone? **(READ AND RECORD)**

Activity (using an App or Mobile web on a Smartphone)	Daily	Weekly	Monthly	Do Not Use
Send / receive to email	[ ]	[ ]	[ ]	[ ]
Send / receive text	[ ]	[ ]	[ ]	[ ]
Take photos / videos	[ ]	[ ]	[ ]	[ ]
Search the web	[ ]	[ ]	[ ]	[ ]
Shop online	[ ]	[ ]	[ ]	[ ]
Social networking (Facebook, etc)	[ ]	[ ]	[ ]	[ ]
Streaming music, video, etc.	[ ]	[ ]	[ ]	[ ]
Play video games	[ ]	[ ]	[ ]	[ ]
Use location-based site or application (to find a nearby business or attraction)	[ ]	[ ]	[ ]	[ ]

**NOTE: PLEASE RECRUIT for 4+ ACTIVITES ACROSS ALL SEGMENTS.**

Q14. Do you use mobile Apps on your Smartphone on a regular basis?

- Yes ..... [ ]
- No ..... [ ]

Q15. Out of the Apps you use on a regular basis, which one is your favorite App? Why?

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**NOTE: IF RESPONDENTS DO NOT PROVIDE WELL-THOUGHT-OUT, WELL-COMMUNICATED RESPONSES, OR APPEAR AT ALL UNWILLING TO DISCUSS THEIR THOUGHTS/OPINIONS, TERMINATE.**

**RECRUITMENT QUOTA**

**IF General Population**

- Under 18 years of age ..... [ ] **TERMINATE**
- 18 to 21 years of age ..... [ ] **TERMINATE**
- 22 to 25 years of age ..... [ ] **TERMINATE**
- 26 to 35 years of age ..... [ ] **TERMINATE**
- 36 to 45 years of age ..... [ ]
- 46 to 55 years of age ..... [ ]
- 56 to 65 years of age ..... [ ]
- Over 65 years of age ..... [ ]

**NOTE: Seven total participants will include: (2) over 65; (3) 56-65 & (2) 36-55 years of age**

**IF Disabled**

- Under 18 years of age ..... [ ] **TERMINATE**
- 18 to 21 years of age ..... [ ] **TERMINATE**
- 22 to 25 years of age ..... [ ]
- 26 to 35 years of age ..... [ ]
- 36 to 45 years of age ..... [ ]
- 46 to 55 years of age ..... [ ]
- Over 55 years of age ..... [ ]

**NOTE: Two total participants will include (2) 22-55 years of age**

**IF Representative Payee**

- Under 18 years of age ..... [ ] **TERMINATE**
- 18 to 21 years of age ..... [ ]
- 22 to 25 years of age ..... [ ]
- 26 to 35 years of age ..... [ ]
- 36 to 45 years of age ..... [ ]
- 46 to 55 years of age ..... [ ]
- 56 to 65 years of age ..... [ ]
- Over 65 years of age ..... [ ] **TERMINATE**

**NOTE: Three total participants will include: (1) 18-21 & (2) 22-65 years of age**

## INVITATION

Thank you for your responses. We would like to invite you to participate in a market research project. The research project will consist of a number of individual interviews throughout the day. Your interview will take about 60 minutes. You will be paid **\$75** for your participation.

Are you interested?

YES.....[ ] CONTINUE  
NO.....[ ] THANK YOU AND **TERMINATE**

### PLEASE READ.

The interviews are being conducted on the following dates **January x1 – x2, 2015**. I have a schedule in front of me so we can make an appointment for a convenient time (see below for time slot availability).

**Would you be able to participate on these dates?**

YES.....[ ] CONTINUE  
NO.....[ ] THANK YOU AND **TERMINATE**

**We greatly appreciate your participation in this study.**

### I. General Population

Participant sessions will be 1 hr. (with ½ hr. between sessions)		
<b>1/x1</b>	<b>9:00-10:00 AM</b>	iPhone
<b>1/x1</b>	<b>10:30 – 11:30 AM</b>	iPhone
<b>1/x1</b>	<b>3:30 – 4:30 PM</b>	iPhone
<b>1/x2</b>	<b>9:00 – 10:00 AM</b>	Samsung Sx
<b>1/x2</b>	<b>10:30 – 11:30 AM</b>	Samsung Sx
<b>1/x2</b>	<b>2:00 – 3:00 PM</b>	Samsung Sx
<b>1/x2</b>	<b>3:30-4:30 PM</b>	Samsung Sx

## II. Disabled

Participant sessions will be 1 hr. (with ½ hr. between sessions)	
1/x1 12:00 – 1:00 PM	iPhone
1/x2 12:00 – 1:00 PM	Samsung Sx

## III. Representative Payee

Participant sessions will be 1 hr. (with ½ hr. between sessions)	
1/x1 2:00-3:00 PM	Samsung Sx
1/x1 5:00 – 6:00 PM	iPhone
1/x2 5:00 – 6:00 PM	Samsung Sx

I'll be sending you a confirmation letter with the confirmed date and directions to the Lucas Research agency in Earth City where the interviews will be conducted. To what address shall I send it?

NAME \_\_\_\_\_

ADDRESS \_\_\_\_\_

EMAIL ADDRESS: \_\_\_\_\_

If for any reason you cannot attend, please contact me at \_\_\_\_\_ as early as possible.

We ask that you please be arrive 15 minutes early so as to...

### RECONFIRM DAY/DATE/TIME/LOCATION

<u>Appointment day/time:</u>	
<u>Name of Candidate:</u>	
<u>Daytime Telephone:</u>	
<u>Evening Telephone:</u>	
<u>Date Recruited for:</u>	
<u>Recruiter's Initials:</u>	