MyPBA Usability Study Script – Receiving Benefits

Introduction

Thank you for agreeing to participate in our study. The purpose of this study is to test the accuracy and ease of use of the new My Pension Benefit Access (MyPBA) application on PBGC's website. Your feedback will help us improve MyPBA.

Paperwork Reduction Act notice: This session has been approved by the Office of Management and Budget under OMB Control No. 1212-0066 (expires 10/31/2023). We need to obtain OMB approval and to tell you we obtained that approval in order to conduct this session. Your participation is voluntary and should take about 90 minutes.

Confidentiality: Your responses will be used by PBGC solely for customer service improvement and will be treated with the confidentiality provided by the Privacy Act and the Freedom of Information Act.

During this session we will ask you to create an account, review various information, and create an income verification letter. We will be observing to see that everything is working as intended and to note anything that is unclear or difficult to find. We ask you to be as honest as you can. This information will not be shared with anyone other than PBGC and will be used only to help improve MyPBA.

Individual Introductions

Before we get started, I wanted to let you know who else is on the call with you. My name is Name, and I am a Position. I will be walking you through the session today. With me is Name, one of our MyPBA experts. S/he will be taking notes on what we learn today and answering any technical questions that may arise.

Usability Study

Do you have any questions before we begin?

Let's get started then. Please open your browser and navigate to pbgc.gov. [Facilitator will then guide the participant through the activities below, gathering information on the feedback questions by observation or direct questioning.]

Activity	Feedback
Follow the prompts at login.gov to create an account.	- Did you make it into your MyPBA account? - Was the process easy or difficult? - How long did it take?
Review your beneficiary information.	- Is the information correct? - Is the information incorrect? - Is the beneficiary blank?
Review your pension plan information.	- Is the information correct? - Is the information incorrect? - Are any of your plans missing?
Review your payment history and/or 1099.	- Were you able to find them? - Was the process easy or difficult? - How long did it take?
Create an income verification.	- Were you able to finish the process? - Was the process easy or difficult? - How long did it take?
Review your data.	- Is there anything you are looking for that you cannot find? - Are there any items that could be more logically or clearly labeled? - Please provide one or two general feedback comments. [Facilitator may prompt if needed with topics such as look and feel, navigation, plain language, speed of loading.]

That concludes our questions for today, but we are interested in any additional comments or suggestions you would like to share. Is there anything further you'd like us to know about your experience with the new MyPBA?

Conclusion

Thank you so much for your time today. Your feedback is very much appreciated and will be used to improve MyPBA. Enjoy the rest of your day!