

# Office of Financial Readiness 2022 Usability Study – Supporting Documents

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# Confirmation email template

Dear [INSERT USER NAME],

Thank you for your interest and participation in the upcoming study! Below is some important information for you to review prior to your session.

Date: [ ]

Time: [ ] (Please sign in 5 minutes prior to ensure we do not have technical issues)

Location: Remotely from your own home/office

Compensation: \$75

**\*\*Please add your session date and time to your calendar now.\*\***

- [IF NDA LINK IS PROVIDED]  
Please use the link below to sign and return the Non-Disclosure Agreement & Video Consent. We will need this prior to your scheduled session. After clicking the link, you will be asked to verify your email with HelloSign. Once your email is verified, you will receive a second email with the direct link to the forms you need to sign. Let us know if you have any issues or any questions. Click Here: [INSERT LINK]  
[IF NDA ATTACHMENT INSTEAD]  
Please sign and return the attached Non-Disclosure Agreement & Video Consent. We will need this prior to your scheduled session. Let us know if you have any questions.
- In order to participate in the study, you will need a [INSERT TECHNOLOGY DEVICE NEEDED] and a quiet place to be so you will not be disturbed or interrupted during your session time.

## REMOTE INSTRUCTIONS:

- The researcher running your remote session will email you the Zoom meeting link before your session. Please join the meeting and connect to audio so you will be able to communicate with the researcher.
- The session will be conducted via Zoom, which is a screen sharing tool. Zoom will allow you and our analyst team to communicate and share whatever is being reviewed.

## PRIOR TO YOUR REMOTE SESSION:

- Please click on the test link below to ensure your computer can access and install the necessary software that will enable sharing during your session.  
[Zoom Test Link](#)
- Please test this link on the actual computer you will be using for the study. If for any reason your computer cannot successfully download what is needed, let us know immediately. Unfortunately, you will not be able to participate if your computer cannot download the necessary software.

OMB CONTROL NUMBER: 0704-XXXX  
OMB EXPIRATION DATE: XX/XX/XXXX

- If anything should come up and you cannot make your scheduled time, please contact us immediately at [INSERT PHONE NUMBER].

Thank you again for your participation.

[INSERT RECRUITER EMAIL]

## Example of Social Media Post

Receive \$75 for your opinions and insight! We are looking for military service members and military spouses/eligible partners to participate in a one-on-one remote website usability study on the topic of financial resources, focusing on website content, layout, and navigation. Sessions are 90 minutes and will take place over the dates of [INSERT DATES]. If you are interested, please click the link to answer some questions to see if you fit into a needed segment.

[INSERT ONLINE SCREENER LINK]



## Reminder email template

Dear [INSERT NAME],

This is a reminder that we have you scheduled for a study:

**Please reply to this email to confirm your session if you are still able to attend. If you are *unable* to attend, please call me directly at [INSERT PHONE NUMBER] to let me know.**

**Date:** [ ]

**Time:** [ ] (Please sign in 5 minutes prior to ensure we do not have technical issues)

**Location:** Remotely from your own home/office

- [IF NO NDA HAS BEEN RECEIVED YET]  
Our NDA and Video Consent Form **MUST** be signed prior to the start of your remote session.  
[IF LINK] Please use the link below to sign and return the NDA. [INSERT LINK]  
[IF ATTACHED] Please sign and return the attached NDA and Video Consent Form
- If you haven't tested Zoom on your computer, please do so before your scheduled time slot. [Zoom Test Link](#)
- Please remember, in order to participate in the study, you will need a [INSERT APPLICABLE DEVICE] and a quiet place to be so you will not be disturbed or interrupted during your session time.
- The researcher running your remote session will email you a Zoom meeting link a few minutes before your session. Please join the meeting and connect to audio so you will be able to communicate with the analyst.

Thank you,

[INSERT EMAIL SIGNATURE]

# Research email invite template

Hello!

Galloway Research is currently seeking military service members and military family members for a website usability study on the topic of financial resources, focusing on website content, layout, and navigation.

Dates of Research: [INSERT DATE]

Format: [REMOTE (MOBILE or DESKTOP), IN-PERSON, ETC.]

Time Commitment: 90 minutes

Compensation: \$75

To determine if you pre-qualify for a needed segment, please click the link to begin our online screener: [LINK FOR SURVEY]. The online screener is completely voluntary, and you can choose to close/end the online screener at any time.

We will contact individuals based on the order in which qualified responses are received. If your qualifications/experiences match what is needed for the study, we will call you to ask additional questions over the phone. If you do not receive a phone call from us, it likely indicates one of your demographic segments has been filled or your experience does not match what is currently needed.

We appreciate your time and interest!

Thank you,  
[RECRUITER NAME]

Follow us on social media!  
[IF APPLICABLE, INSERT SOCIAL MEDIA LINKS]

[RECRUITER SIGNATURE]

## Thank you email template

Hello [INSERT NAME],

We greatly appreciate your time and participation in the most recent research study with us. Your feedback and insight were extremely helpful and will help drive our passion of improving user experience!

Your \$75 incentive will be sent in the form of a gift card via the United States Postal Service. Usability Sciences Corporation will be mailing out your gift card within 3 business days of your participation. You should receive your gift card within 7-10 business days.

Thanks again for your time. We look forward to seeing you in another research study in the future. Please be sure to tell your friends and colleagues about us! Have a wonderful day.

[INSERT EMAIL SIGNATURE]

# Non-disclosure agreement and video consent

## Usability Sciences Corporation

### Non-Disclosure Agreement & Video Consent Release Form

	In consideration of the disclosure of confidential information and materials by Usability Sciences Corporation, a Texas corporation, to (your name) _____, (further to be identified as Individual) the parties agree as follows:
<b>Definitions</b>	"Confidential Information" means non-public information that USABILITY SCIENCES CORP designates as being confidential or which, under the circumstances surrounding the disclosure should be treated as confidential. "Confidential Information" includes, but is not limited to, information relating to unreleased USABILITY SCIENCES CORP products, the marketing or promotion of such products, USABILITY SCIENCES CORP business policies or practices, and information received from other parties, which USABILITY SCIENCES CORPORATION is obligated to treat as confidential. "Confidential Information" does not include information that Individual receives from a third party which is not subject to an obligation to maintain the confidentiality of such information, or information, which is publicly available. "Confidential Information" does not include information rightfully in Individual's possession prior to disclosure, and information independently developed by Individual without the use of any "Confidential Information". "Confidential Materials" means all tangible materials containing Confidential Information, including but not limited to, unreleased USABILITY SCIENCES CORP products, documentation, and advertising and promotional materials.
<b>Obligations and Restrictions</b>	Individual agrees not to disclose, sell, license, sublicense, transfer, or otherwise convey any Confidential Information or Confidential Materials to third parties. Individual agrees to take reasonable security precautions (at least as great as the precautions it takes to protect its own confidential information) to keep confidential any and all Confidential Information and Materials. Individual agrees to notify USABILITY SCIENCES CORPORATION immediately upon discovery of any unauthorized use or disclosure of Confidential Information or Materials and will cooperate with USABILITY SCIENCES CORPORATION to help USABILITY SCIENCES CORP regain possession and prevent further unauthorized use of the Confidential Information or Materials. Individual agrees to return to USABILITY SCIENCES CORPORATION all originals, copies, reproductions, and summaries of Confidential Information or Materials at USABILITY SCIENCES CORP's request. Individual agrees not to reverse-engineer, recompile, or disassemble any software provided to you.
<b>Property Rights</b>	At all times Confidential Information and Materials remain the property of USABILITY SCIENCES CORP. Individual understands and acknowledges that Confidential Information and Materials are USABILITY SCIENCES CORP's valuable property.
<b>General</b>	This Agreement constitutes the entire agreement between the parties with respect to this subject



	<p>matter, and it may be modified only by a subsequent written agreement. This Agreement shall begin on the date of execution and shall expire two (2) years thereafter. This Agreement is governed by the laws of the state of Texas and is binding upon the parties, their successors, and assigns. This Agreement shall be construed and interpreted so as to be enforceable to the fullest extent permitted by law, and the unenforceability of any provision shall not affect any other provision hereof.</p>
<b>Video Consent</b>	<p>All or some of your work with this product will be digitally recorded. By signing this form you hereby grant permission to Usability Sciences Corporation and its affiliates and clients, to use your picture and/or verbal comments, but NOT your name or company of employment, for internal purposes only.</p>
<b>Acceptance</b>	<p>By signing below, the parties have indicated their acceptance of this Agreement.</p>
<b>Individual Identification</b>	<p>By signing below, you are attesting that you are not misrepresenting or falsifying your information or identity.</p>

*Not applicable for remote sessions*

Name: X \_\_\_\_\_

Witness Signature: \_\_\_\_\_

Signature: X \_\_\_\_\_

Date: X \_\_\_\_\_

Date: X \_\_\_\_\_

OMB CONTROL NUMBER: 0704-XXXX  
 OMB EXPIRATION DATE: XX/XX/XXXX

# Online Screener Draft

## 1-1 Remote Research Sessions with Military Service Members and Families

Dates: TBD

Greetings! Thank you for your time today.

We are currently recruiting military service members and military family members for a website usability study on the topic of financial resources, focusing on website content, layout, and navigation. These are 90-minute one-on-one remote discussions, led by a researcher from Usability Sciences Corporation. Sessions will take place [insert dates] and those who qualify AND participate will receive a \$75 gift card as a thank you for their time.

This online pre-screener survey should only take about 5 minutes of your time. Those who meet the initial criteria within this survey will be contacted and taken through a short series of questions to verify they meet the research requirements and fit into a needed segment. Please note, this pre-screener survey is completely voluntary and should only be filled out if you are interested in the study. You may choose to close/end the online screener at any time.

This study is sponsored by the Department of Defense Office of Financial Readiness (after first use: DoD Office of Financial Readiness). Study staff will diligently protect your personal information and ensure that your opinions, ideas, concerns, etc. will not be identifiable as you. Additionally, for your information, we wanted to let you know that the team has received permission through the Office of Budgeting and Management (OMB) to conduct this research, which meets licensing requirements outlined in the Paperwork Reduction Act.