Informed Consent Form

This study is to test the functionality and usability of the application.

The information will only be used to further improve the overall features and functions of the application. It will not be shared with others and will not be publicized.

I understand that participation in this usability study is voluntary, and I agree to immediately raise any concerns or areas of discomfort during the session with the test recruiter.

Please sign below to indicate that you have read, and you understand the information on this form and that any questions you might have about the session have been answered.

Thank you in advance for your participation.

Date:

Your Name (in PRINT):

Your Signature:

Test Participant Recruitment Details

In terms of finding test participants for my usability testing, I will be conducting 2 moderated testing along with 4 additional remote testing (moderated and/or unmoderated). The test participants will be a part of my personal network with diverse demographic backgrounds to reduce sampling biases. In-person access will provide efficiency for the 2 moderated testing subjects. Remote testing would have to be conducted via the Zoom platform either in real-time (preferable method) or unmoderated (if scheduling conflict arises). To ensure my participants are fully informed about the purpose of the study, I will be briefing them ahead of time through my recruitment, confirmation, and reminder email. I will also personally reach out to them on the day of to make sure there is no issue on hand. Finally, all participants will be given the consent form at the beginning of the study to review. This will confirm their voluntary participation in the study and will allow me the ability to address any concerns or questions they might have.

Recruitment Email

Subject Line: Invitation to participate in a usability study to improve an educational financial app.

Dear (name),

My name is Chelsi, and I'm conducting a usability study for my personal project that involves the construction of an educational financial app, Kale. This study is to further enhance the features and functionality of the app itself and is NOT a test on your financial knowledge. I have listed a few key details regarding the study below.

Study Purpose: Improve overall usability of my app. It is not a test on your personal knowledge.
Length: 10-15 minutes.
Location & Time: Based on your availability, I will reach out personally upon your reply to schedule a time and location best suited to you.

Please respond to my email regarding your willingness to participate in this study and I will be more than happy to address any further questions you have.

Thank you for your time and interest,
Chelsi Ng

Confirmation Email
In-Person

Subject Line: Confirmation on your participation in my usability study.

Dear (name),

Thank you for your response regarding your participation in my usability testing for my educational financial app, Kale. As I mentioned, I will conduct a testing regarding the app's features and functions and will require your overall thoughts and experience after the study. No preparation will be necessary on your part.

The details regarding the study will be listed below.
Date: (date)
Time: (time)
Place: (location)

During the study, you will be asked to complete a few tasks using the app and are welcomed to talk out loud as you work to complete the tasks. I will be there to facilitate the process if it becomes challenging. In addition, the session will be recorded by video or by audio. The recording will only be used by me as an analytical piece to enhance the application. It will not be shared beyond that stated scope.

Please kindly confirm the details listed above and let me know if there's any concerns or questions regarding the study or your session.

Thank you,
Chelsi Ng

Remote

Subject Line: Confirmation on your participation in my usability study.

Dear (name),

Thank you for your response regarding your participation in my usability testing for my educational financial app, Kale. As I mentioned, I will conduct a testing regarding the app's features and functions and will require your overall thoughts and experience after the study. No preparation will be necessary on your part.

The details regarding the study will be listed below.
Date: (date)
Time: (time)
Place: Your Computer

One hour before the study, I will be sending a Zoom invite link to access the remote meeting via email. Please check your email an hour prior and email me if there's any issue regarding your access.

During the study, you will be asked to complete a few tasks using the app and are welcomed to talk out loud as you work to complete the tasks. I will be there to facilitate the process if it becomes challenging. In addition, the session will be recorded by video or by audio. The recording will only be used by me as an analytical piece to enhance the application. It will not be shared beyond that stated scope. Please read the "Informed Consent Form" (attached) and email the signed copy prior to the study.

Please kindly confirm the details listed above and let me know if there's any concerns or questions regarding the study or your session.

Thank you,
Chelsi Ng

Reminder Email
In-Person

Subject Line: Reminder for the usability testing tomorrow.

Dear (name),

Thank you again for agreeing to participate in the usability testing for my educational financial app, Kale. I am looking forward to talking with you.

The details regarding the study will be listed below.
Date: (date)
Time: (time)
Place: (location)

During the study, you will be asked to complete a few tasks using the app and are welcomed to talk out loud as you work to complete the tasks. I will be there to facilitate the process if it becomes challenging. In addition, the session will be recorded by video or by audio. The recording will only be used by me as an analytical piece to enhance the application. It will not be shared beyond that stated scope.

Please kindly confirm the details listed above and let me know if there's any concerns or questions regarding the study or your session.

Thank you,
Chelsi Ng

Remote

Subject Line: Reminder for the usability testing tomorrow.

Dear (name),

Thank you for your response regarding your participation in my usability testing for my educational financial app, Kale. As I mentioned, I will conduct a testing regarding the app's features and functions and will require your overall thoughts and experience after the study. No preparation will be necessary on your part.

The details regarding the study will be listed below.
Date: (date)
Time: (time)
Place: Your Computer

One hour before the study, I will be sending a Zoom invite link to access the remote meeting via email. Please check your email an hour prior and email me if there's any issue regarding your access.

During the study, you will be asked to complete a few tasks using the app and are welcomed to talk out loud as you work to complete the tasks. I will be there to facilitate the process if it becomes challenging. In addition, the session will be recorded by video or by audio. The recording will only be used by me as an analytical piece to enhance the application. It will not be shared beyond that stated scope. Please read the "Informed Consent Form" (attached) and email the signed copy prior to the study.

Please kindly confirm the details listed above and let me know if there's any concerns or questions regarding the study or your session.

Thank you,
Chelsi Ng