

Supplement B – Participant Task Guidebook

Below is the guidebook given to the participants to guide them through the interaction phase of the study.

The following is your guidebook for interacting with and evaluating our prototype online banking interface that is intended to support informal caregivers. There are multiple “days’ worth” of tasks we would like you to perform. While you do these tasks, we would like for you to talk through your experience and impressions aloud. As stated previously, all tasks are optional and if you are uncomfortable or unfamiliar with any, we encourage you to skip them (please verbally indicate if you are doing so).

To ensure that we have enough time to discuss the interface afterwards, we will limit this section to 20 minutes. If you have any questions, feel free to ask your interviewer.

Reminder #1: Please think aloud as you work through the tasks listed below.

Reminder #2: This a fake banking interface, and we will not ask for any information related to you or your relations real-world bank accounts or activities. No actions taken within this system will be reflected in the real-world.

Task Set (“Day”) #1

Imagine you have banking tasks to do for the older adult you assist. Please do the following while thinking aloud:

1. Navigate to the online banking system at <https://banking-study.cs.umanitoba.ca>
2. Log in to the system using the following:
Username: <username>
Password: <password>
3. Perform the “day’s” banking tasks on behalf of the older adult you’re helping. *(Skip any you are uncomfortable with.)*
 - Transfer \$200.00 from Account A (savings) to Account B (chequing) to ensure there are enough funds in the account for the older adult to pay for groceries this week using their debit card.
 - Pay the latest cell phone bill of \$54.67 to Telecom Wireless Inc. from Account B.
 - Pay off the outstanding balance on the credit card ending in 4321.
 - Reimburse yourself \$96.54 for the groceries you bought last week. (Your account is already set up in the list of recipients.)
4. Once you have completed all your tasks for the “day”, please log out of the system before proceeding.

Task Set (“Day”) #2

Imagine it is now the following week and you have more banking to do for the older adult you assist. As before, please do the following while thinking aloud:

1. Log back in using the same username and password as above
2. Perform your banking tasks for the “day”. *(Skip any you are uncomfortable with.)*
 - A local carpenter came to fix the handrail in the older adult’s house the other day. E-transfer them \$217.17 at handyperson@carpentry.com.
 - You’ve organized a new professional caregiver to come administer the older adult’s medication, so you’ll need to be paying them regularly. Do the following:
 - o Set up a new e-Transfer payee: Alex Caregiver, a.care@caregivers.com, 204-555-1173
 - o Send an initial e-Transfer of \$60 directly to cover the current week.
 - o Set up an automatic payment of \$120 every other Monday starting on the next Monday.
 - The older adult you support is very thankful for all the help you’ve provided over the last couple weeks, so they would like you to transfer \$20 to your connected account directly as a token of their appreciation.
3. Once you have completed all your tasks for the “day”, please log out of the system and let your interviewer know you are finished!