

## Consent Form

Please read and provide consent (below) prior to the interview. Return by email or post. Thank you!

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**Project Title:** Interview of Close Others Helping Older Adults with Banking & Finance Management

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Please take the time to read this carefully and to ensure you understand all the information.

This consent page should give you the basic idea of what this research is about and what your participation will involve. If you would like more detail about something mentioned here, or information not included here, you should feel free to contact Dr. Celine Latulipe ([celine.latulipe@umanitoba.ca](mailto:celine.latulipe@umanitoba.ca)).

You are being asked to participate in an interview on the topic of helping older adults with banking and financial management. This interview is meant to be completed by anyone who is a 'close other'. A 'close other' is a family member, friend, neighbour or paid assistant who helps an older adult with various activities. The researchers are interested in understanding how participants help older adults with conducting banking and financial management activities. Consent to being audio recorded is a requirement for participation. Failure to provide this consent will indicate that you are not able to participate and no further contact will be made.

Interview responses will be kept confidential and we will only report aggregate data or anonymized quotes in our research. Risks to participating in this study are no greater than in everyday life. The direct benefit of this research is the ability to provide insight on issues that affect you as the person providing banking assistance to an older adult. We will optionally collect your email address prior to the interview so that we can send your choice of a \$20 Tim Hortons or a \$20 Shoppers Drug Mart gift card.

You can quit the interview at any time by notifying the research assistant, none of your answers will be saved and your data will not be used in the research. Upon withdrawal all files and recordings will be deleted. If you withdraw before the interview is complete, you will still receive a gift card. Once you complete the interview, you will no longer be able to withdraw your information from the study. If you provide your name and email address for the gift card, that information will not be linked to your interview responses, as it is collected on a separate form and stored in a separate file on our secure university server. Your interview responses will be stored in a file called P1\_responses.doc or P2\_responses.doc and will not contain your name or the name of the older adult you help. Audio recordings will be collected on an Ipad and encrypted. Summary of findings and anonymized versions of the audio transcripts will be retained for a minimum of 5 years. All other data will be destroyed by March of 2021. Results from this study will be submitted for review and publication to peer-reviewed academic journals and conferences (written and in presentation form).

Participation in this study is voluntary. Completing the interview will take between 30 and 60 minutes, depending on how many ways you help an older adult with their banking. You can quit the interview at any time by notifying the research assistant, none of your answers will be saved and your data will not

be used in the research. Upon withdrawal all files and recordings will be deleted. If you withdraw before the interview is complete, you will still receive a gift card. Once you complete the interview, you will no longer be able to withdraw your information from the study.

This research study will be conducted in the following order of steps:

1. Participants will complete and return the consent form
2. Interview will be scheduled at a time convenient to the participant
3. At beginning of interview, will reminder that this session is being audio recorded and that withdrawal at any point is permitted.
4. Gift card will be sent regardless of whether the interview is completed.
5. Interviews will be completed during December, 2020. A participant cannot withdraw from the study after they have completed the interview, as data analysis will begin immediately.
6. In the event of withdrawal all data and audio recordings will be destroyed.
7. Data will be anonymized using pseudonyms to ensure confidentiality.
8. A non-technical summary of results will be made available to those who have chosen to receive same.
9. Reports will be submitted for peer review and publication.

Once published, the results of this research will be made available to the public for free on the following webpage: <https://celinelatulipe.net/12-2/interview-study-close-others-banking/> . Again, no personal information about you will be included.

The interview will be recorded in an audio only format. In no way does this consent form waive your legal rights nor release the researchers, sponsors, or involved institutions from their legal and professional responsibilities. You are free to withdraw from the study at any time, without prejudice or consequence by simply letting the research assistant know. Your continued participation should be as informed as your initial consent, so you should feel free to ask for clarification or new information throughout your participation.

The University of Manitoba may look at your research records to see that the research is being done in a safe and proper way. This research has been approved by the University of Manitoba Joint Faculty Research Ethics Board. If you have any concerns or complaints about this project you may contact any of the above-named persons or the Human Ethics Coordinator at (204) 474-7122 or [humanethics@umanitoba.ca](mailto:humanethics@umanitoba.ca). If you wish to have a copy of this consent form for your records and reference, you can click [here](#) to download a copy.

**If you provide care or support to an older adult (age 65+) in your life (such as an aging parent, aunt, uncle, neighbor, client or friend), you are eligible to participate in this study.**

**The information collected in the interview will be kept confidential and reported only in aggregate or as anonymized quotes. The information collected will help us to design better technologies to support your role as a 'close other' or 'caregiver' when you help your older adult with technology or use technology on their behalf.**

Please indicate your response to each of the three sections below:

Are you a 'close other' (someone who provides care or support) to an older adult?

- Yes
- No

By checking this box, you certify that you live in Canada, that you are at least 18 years old, that you have understood to your satisfaction the information provided regarding your participation in the study, that you speak and read English and that you give your consent freely to being a participant in this study and that you consent to being audio recorded during the interview.

- I consent
- I do not consent

You request a copy of the research summary prior to any peer reviewed publication of results by March 2021

- Not required
- Yes send to my Email

Name (please print): \_\_\_\_\_

Email (for scheduling): \_\_\_\_\_

Signature: \_\_\_\_\_ Date: \_\_\_\_\_

Please email this completed form to: [cumbersm@myumanitoba.ca](mailto:cumbersm@myumanitoba.ca) or mail it to:

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