Internal Revenue Service
DEPARTMENT OF THE TREASURY

Internal Revenue Service
IRS.gov 2006 Nationwide Tax Forum (NTF)
Usability Study

Usability Test Plan

Summer 2006

Product Overview

IRS.gov is seeking to test the redesign of its current website, which was implemented in the fall of 2005. Usability testing will provide data on the performance of the website. Previous tests were performed prior to the implementation of the redesign of IRS.gov. Therefore, usability studies are needed to verify that the changes made are enhancing the users' experience on the web site. However, for this study it will be dedicated to the Tax Practitioner, Individuals and Business portion on IRS.Gov.

Usability Test Objectives

The new design proposes a new way to navigate the IRS.gov site using a top navigation model along with a combination of links and drop down menus that contain the roles and sub-roles similar to the current site (Individuals, Employees etc.). The objective of this data collection method is to capture the usability baseline performance metrics of the existing site.

Usability Measures

Usability measures collected during this test will include:

Time spent to complete a task *[not sure about this]*

Navigation paths used and type of navigation i.e. "I need to..." dropdown vs. main navigation

User satisfaction ratings (Post Test Questionnaire)

Number of times user required help from facilitator

Task success rate (scale of 1 – 5)

Error recovery

User Profile

Public – External Customers

External Customers	Target #
Individuals – maximum of 1 retired/Senior Citizen and maximum of 1 Student, homemaker or underemployed individual	4
Employed Individuals	8
Paid Tax Preparers / Tax Professionals	12
Business Representatives	12

- General knowledge of the internet with frequent use
- Knowledge and job responsibilities for individual and/or business tax filing

Usability Test Procedures

The test is designed to take approximately 60 minutes for each participant to complete. Tests will be conducted between the hours of 8:00 AM and 4:00 PM during the work days. Testing three user groups, representing Individuals, Business and Tax Professionals the IRS.gov test team will use a sampling of participants from the following cities where the 2006 Nationwide Tax Forums will be conducted. Cities included for this year are Orlando, FL, Las Vegas, NV, Atlanta, GA, and New York, NY. Recruitment will be on a volunteer basis for Tax Professionals who would like to be involved. Consumer Opinion Services, Inc. will recruit participants for the Individuals and Business. The desired goal for each city will be 3 participants per day, 3 days per tax forum, for a total of nine participants per site or a maximum of thirty six participants nationwide. The data collection will follow a classic usability test design for testing in the field with one participant going through various tasks to assess functionality of IRS.gov. The participant will be asked to use a talk-aloud method to inform the moderator and other observers of their thought process. The participant will be encouraged to continue trying each task until he either completes it successfully, or the moderator determines the level of frustration to be too high and asks them to begin a new task.

The usability test will be based on scenarios. Scenarios are brief problem statements that the participant solves by using the site. The scenarios will be tailored to the participant's background, i.e., tax preparers will work scenarios designed for tax preparers. The test team will prepare various suites of scenarios reflecting situations typical for each different test group. The monitor and one or two note takers observe the test and work with the participant, where needed.

The moderator will introduce himself/herself, provide an overview of the test process and ask the participant to sign a consent form that explains what the participant is going to do and how IRS plans to use the information gathered during the test.

None of the personally identifiable information will be shared outside the test environment and the IRS.gov test team will destroy all background information on completion of the test. This will be communicated to each participant during the introduction.

After the introduction, each participant will work scenarios individually on a computer of approximately 10 minutes each until there are 15 minutes remaining. Participants will be asked to complete specific tasks with minimal intervention or assistance. They will be asked at the beginning of the first task (and occasionally throughout the session, if necessary) to "think aloud" so that their thoughts about the site and their interactions with the site can be recorded. Any assistance that is required or requested by the participant will be recorded and the session facilitator may also ask probing questions in response to user requests for help.

If a scenario takes longer than 10-12 minutes, the moderator will ask the participant to proceed to the next scenario. At the conclusion of the scenarios, the moderator will debrief the participant. Debriefing consists of open discussion and an exit questionnaire. In the exit questionnaire, the participant provides structured feedback on the test experience. Once the Individual and Business participant has completed the test and questionnaire, s/he is awarded a stipend of $75.00. The Tax Professional participant will be thanked for s/he participation while attending the tax forum.

Documents including the facilitator checklist and participant consent form are attached that illustrate the process that will be used to conduct the study sessions.

Participants will use a laptop running Windows XP. The screen resolution of the monitor will be set to 800 x 600 with Windows display properties set to "Medium Fonts". Participants will access the site by using Internet Explorer 6.0.

Task Scenarios

Task Scenarios: Individuals

1. To be filled in...
   [Target = Individual >]

Task Scenarios: Tax Professionals

1. To be filled in...
   [Target = Tax Professionals >]

Task Scenarios: Businesses

1. To be filled in…
   [Target – Businesses >]

Test Environment and Equipment

This usability test will be conducted at the 2006 Nationwide Tax Forums in a conference room.

The following equipment will be used for this test:

- Workstation and chair

- Lapel microphone to be worn by the participant to ensure all comments and feedback can be heard by the test team in the observation room.

- Webcam to record video of participant.

- Laptop Computer with Windows XP operating system, and Internet Explorer 6.0.

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Usability Test Roles

This section describes the roles of people involved directly or indirectly in the usability test sessions and describes the procedure that will be followed for each test session and the task scenarios that participants will attempt during the test sessions

The following roles are required before and during the period over which usability testing takes place:

- **Planner and coordinator** – Usability Administrator ensures that everything is in place to allow the usability test sessions to take place as planned and without problems.

- **Participant recruiter** – recruits participants and schedules them for available time slots; provides test facilitator with honorarium checks to give to each participant at the end of their test session.

The following roles are required in order to conduct a usability test session:

- **Test Facilitator/Facilitator**

  - Usability Consultant oversees the test itself, introduces and explains the test session to the participant, observes participant's actions and obtains participant feedback at completion of test session, conducts issues assessment session. The facilitator is also available to answer questions and ensures that the observer stakeholders stay on task and have a productive and successful experience.

- Usability Consultant stays with the participant during the test session, asks and reminds participant to think aloud, observes participant's actions as they attempt tasks and intervenes when appropriate.

- **Test data logger** – creates a written record of the participant's actions and comments as they use the site using data logging software, a word processor, or a spreadsheet.

The following roles are optional for any given usability test session:

- **Observer(s)-team member** – observes test to identify functionality and performance, compares notes with other team members, and actively participates in Issues Assessment at end of each test session.

- **Observer-stakeholder** – observes test in order to gain a richer understanding of the nature and significance of the overall usability test, and to witness firsthand some of the usability issues present in the stakeholders areas of the site.

Deliverables to Client

Final Usability Report
- Executive Summary
- List of Usability Issues
- Task success rates
- Questionnaire results
- Recommendations

Assumptions

- All usability tests will be physically conducted at the 2006 Nationwide Tax Forums.

- The IRS will arrange and ensure the proper functioning of remote viewing from New Carrollton, MD. If applicable.

- Development project will be responsible for participant recruitment and compensation if necessary with guidance from members of the IRS Usability Team.

- This study will not be evaluating the products' conformance with Section 508 regulations.

Project Team

The following table shows the test roles and who will fill them:

Role	Name(s)	Business Operating Division	Organization	Job Title	Contact Information
Planner and coordinator	Shawn Tafoya	MITS	CADD	Usability Administrator	**Shawn.A.Tafoya @irs.gov** (801)620-4060
Participant recruiter	Stephanie Meekhof	N/A	Consumer Opinion Services	Project Manager	**stephanie.meek hof@portlandopi nion.com** 503.493.2870 x31
Test Facilitator	TBD by Usability Staff				
Test team lead	Liz Baker	Public Portal Office (IRS.gov) OS:CIO:I:ET:ID:P P	IRS		Liz.baker@irs.gov 202-283-7847
Observer-stakeholder	TBA	Public Portal Branch (IRS.gov) OS:CIO:I:ET:ID:P P	IRS		
Observer-team member	TBA	Accenture Government Center	Accenture		

System Requirements

Application URL	TBA		
Server Requirements	TBA		
Hardware needed	Screen Resolution of 800 x 600		
Software needed	Internet Explorer		
Project Technical Contact Point	*Shawn TaFoya 801-620-4060* *minsuk.kim@accenture.com*		
Usability Technical Contact Point	Howard Schuyler 801-620-4056 howard.schuyler@irs.gov		
Remote Viewing			
	Yes?	Number Viewing	Sites Viewing

	6	1

Accessing Test Software

1. Browser Requirements

IRS.gov Nationwide Usability Study was designed for and should be viewed with the Internet Explorer web browser, at a minimum screen resolution of 800 x 600 pixels.

2. Proxy Requirements

- To be determined

3. Accessing the Prototype

Open the Internet Explorer browser and access IRS.gov Nationwide Usability Study at: TBD

Test Agenda

Tuesday

8:00 am – 9:30 am	Part #1
10:00 am – 11:30 am	Part #2
11:30 am – 1:00 pm	Lunch
1:00 pm – 2:30 pm	Part #3
3:00 pm – 4:30 pm	Make up Session

Wednesday

8:00 am – 9:30 am	Part #4
10:00 am – 11:30 am	Part #5
11:30 am – 1:00 pm	Lunch
1:00 pm – 2:30 pm	Part #6
3:00 pm – 4:30 pm	Make up Session

Thursday

8:00 am – 9:30 am	Part #7
10:00 am – 11:30 am	Part #8
11:30 am – 1:00 pm	Lunch
1:00 pm – 2:30 pm	Part #9
3:00 pm – 4:30 pm	Make up Session

Office of Management and Budget
Clearance Package

Internal Revenue Service
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IRS.gov 2006 Nationwide Tax Forum (NTF) Usability Study

Internal Revenue Service
June 11, 2006

Office of Management and Budget Clearance Package
IRS.gov 2006 Nationwide Tax Forum (NTF) Usability Study

Introduction

Background/overview
IRS.gov is seeking to test the redesign of its current website, which was implemented in the fall of 2005. Usability testing will provide data on the performance of the website. Previous tests were performed prior to the implementation of the redesign of IRS.gov. Therefore, usability studies are needed to verify that the changes made are enhancing the users' experience on the web site. However, for this study it will be dedicated to the Tax Practitioner, Individuals and Business portion on IRS.Gov.

Objectives of data collection
The new design proposes a new way to navigate the IRS.gov site using a top navigation model along with a combination of links and drop down menus that contain the roles and sub-roles similar to the current site (Individuals, Employees etc.). The objective of this data collection method is to capture the usability baseline performance metrics of the existing site.

Methodology

Sample design
Testing three of seven user groups, representing Tax Preparers and Practitioners, Individuals and Business, the IRS.gov test team will use a sampling of participants from the following cities where the annual nationwide tax forums will be conducted for year 2006. Cities included for this year are Atlanta, Ga, Orlando, FL, Las Vegas, Nv and New York, Ny. Recruitment will be on a volunteer basis for Tax Practitioners who would like to be involved. However, the Individuals and Business participants will be recruited from Consumer Opinion Services and paid a stipend. The desired goal for each city will be 3 participants per day, 3 days per tax forum, for a total of nine participants per site or a maximum of 36 participants nationwide. The data collection will follow a classic usability test design for testing in the field with one participant going through various tasks to assess functionality of IRS.gov. The participant will be asked to use a talk-aloud method to inform the moderator and other observers of their thought process. The participant will be encouraged to continue trying each task until he either completes it successfully, or the moderator determines the level of frustration to be too high and asks them to begin a new task.

Data collection dates
Research will be conducted during the following weeks:

Atlanta, GA	July 25 – July 27
Orlando, FL	August 1– August 3
Las Vegas, NV	August 22 – August 24
New York, NY	August 29 – August 31

Data to be collected
This test will gather baseline performance metrics, i.e. task success, task timings, etc. The participant reactions will be monitored by having a moderator sitting with the participant. Study sessions are expected to last approximately 60 minutes per participant.

How data will be used
The data gathered from this research will be instrumental for determining any future revisions to the IRS.Gov website. Future performance metrics will be validated against the baseline data gathered at the tax forums. All information collected is strictly for research, and will not be used to personally identify participants nor will it be shared for commercial purposes.

How data will be analyzed
Study team observations are geared toward assessing the performance (design) of the product. Observations of the users will be reviewed for user preference and to identify areas of the website functionality that are confusing.

Who is conducting the research
The IRS.gov test team consists of one IRS employee, a management analyst assigned to the Public Portal Branch of ETA and two internal usability consultants from the IRS-Ogden Usability Lab. The IRS.gov test team will request and get OMB approval to recruit external test participants.

Location – region/city and facilities
As stated earlier the studies will conducted at the FY-2006 Nationwide Tax Forums in the following cities:

Atlanta, GA	July 25 – July 27
Orlando, FL	August 1– August 3
Las Vegas, NV	August 22 – August 24
New York, NY	August 29 – August 31

Stipend
A $75 per participant stipend will be necessary to recruit a sufficient number of study participants. This stipend will not be paid to Tax Professionals at the Tax Forums. Special care will be made to screen out Tax Professionals that are attending the Tax Forums in Ogden so that there is no confusion between the two events.

Recruitment efforts
Consumer Opinion Services, an external market research firm, will recruit twenty seven participants from two user groups: Individuals and Businesses. Participants will be recruited the week prior to each tax forum. With the usability studies being completed by September 1, 2006.

Methods to maximize response rate and Expected Response Rate
In order to maximize the response rate, the test is being limited to 36 participants (Maximum 9 per city) and the test duration is being held to 60 minutes.

Test structure/design
The test is designed to take approximately 60 minutes for each participant to complete. Tests will be conducted between the hours of 8:00 AM and 5:00 PM during the work days of the following weeks:

Atlanta, GA	July 25 – July 27
Orlando, FL	August 1– August 3
Las Vegas, NV	August 22 – August 24
New York, NY	August 29 – August 31

The test team plans to test a maximum of three participants a day over a period of three days. A test facilitator will facilitate the process to ensure that the test stays on schedule.

The usability test will be based on scenarios. Scenarios are brief problem statements that the participant solves by using the IRS.gov site. The scenarios will be tailored to the participant's background, i.e., tax preparers will work scenarios designed for tax preparers. The test team will prepare various suites of scenarios reflecting situations typical for the test group. The monitor and one or two note takers observe the test and work with the participant, where needed. The participant is encouraged to describe aloud what he/she is thinking and continue with the test, even if he/she has difficulty finding the solution to the scenario.

The monitor will introduce himself/herself, provide an overview of the test process and ask the participant to sign a consent form that explains what the participant is going to do and how IRS plans to use the information gathered during the test.

None of the personally identifiable information will be shared outside the test environment and the IRS.gov test team will destroy all background information on completion of the test. This will be communicated to each participant during the introduction.

After the introduction, each participant will work scenarios of approximately 10 minutes each until there are 15 minutes remaining. If a scenario takes longer than 10-12 minutes, the monitor will ask the participant to proceed to the next scenario.

At the conclusion of the scenarios, the monitor will debrief the participant. Debriefing consists of open discussion and an exit questionnaire. In the exit questionnaire, the participant provides structured feedback on the test experience, a subjective view of IRS.gov website and may be asked to comment on various hypothetical enhancements to the IRS.gov.

Documents including the moderator checklist and participant consent form, are attached that illustrate the process that will be used to conduct the study sessions.

Efforts to not duplicate research

Usability testing has been conducted on the site previously, Future research on the IRS.gov site will be informed by this testing and will not duplicate it – though some of the tasks may be repeated to gather metrics on improvement.

Participants Criteria

Users of the IRS.gov site are looking for a variety of information, including forms, form instructions, tax publications, tax law guidance, tax topics and, to some degree, latest tax news. Many search for specific forms and instructions needed to complete tax returns during filing season, or forms and instructions to assist them in having the correct withholding tax deducted from their salary payments. Employers and individuals both use the site and a smaller but highly visible and vocal constituency of tax preparers and practitioners are regular site users.

The equipment and level of IT skills of IRS.gov site users, of course, varies widely with preparers and employers most likely having a higher degree of IT knowledge and more sophisticated computer systems than individuals. The test plan seeks to gather usability input from a representative sample of tax preparers, to build as broad-based a profile of performance from the client perspective as possible.

The IRS.gov test team has developed and categorized scenarios according to the different types of test subjects being recruited to evaluate IRS.gov performance.

Additionally all participants will meet the following criteria:

- Have not participated in a market research interview or usability study in the past 6 months.

- Do not work for or have immediate family members who currently or ever worked for any of the following:
  o Marketing, Market Research
  o Advertising
  o Internal Revenue Service

- Have access to the internet

- Are comfortable using: a mouse; a keyboard and the internet.

Privacy, Security, Disclosure, Confidentiality

The IRS will ensure compliance with the Taxpayer Bill of Rights II. All participants will be treated fairly and appropriately.

Confidentiality will be safeguarded. During the study sessions, participants will be identified to IRS personnel by their first names only. In addition, no participant names will be mentioned in the study report. Participants will be advised that observers from the IRS may be observing the session and via video monitoring equipment and that their comments may be recorded to ensure accurate data capture. Participants will also be given the OMB Control number for this collection, which is #1545-1349 and given an address in which to direct comments. The address is

Internal Revenue Service
Tax Products Coordinating Committee
SE:W:CAR:MP:T:T:SP
1111 Constitution Avenue NW
Washington, DC 20224

Burden Hours

Individual Participants
Total Screened: 30 @ 25 minute screening interview = 12.5 hours
Total Recruited: 12 people (40% of screened individuals qualify)
Travel Time estimated 2 hours per participant to travel to testing facility and return = 24 hours
Total testing time averaged at 1 hour/participant = 12 hours
Total estimated burden is 48.5 hours

Business Participants
Total Screened: 30 @ 25 minute screening interview = 12.5 hours
Total Recruited: 12 people (40% of screened individuals qualify)
Travel Time estimated 2 hours per participant to travel to testing facility and return = 24 hours
Total testing time averaged at 1 hour/participant = 12 hours
Total estimated burden is 48.5 hours

Tax Professional Participants
Total Screened: 20 @ 25 minute screening interview = 5 hours
Total Recruited: 12 people (65% of screened individuals qualify)
Travel time estimated 0 hours per participant to travel
Total testing time averaged at 1 hour/participant = 12 hours
Total estimated burden is 17 hours

Total burden hours for all participants is estimated at 114 hours.

Attachments

1. Telephone/Participant Screeners
2. Cover Letter/ Correspondence
3. Moderator Checklist
4. Consent form
5. Scenarios
6. Moderator's Guide
7. Exit Questionnaires – Including PRA Statement & OMB Control Number
8. Confirmation Phone Call Scrip
9. Test Plan

Paperwork Reduction Act (PRA) Statement: (This statement should be included on every collection instrument and voiced during every focus group)
The Paperwork Reduction Act requires that the IRS display an OMB control number on all public information requests. The OMB Control Number for this study is OMB Control #1545-1349. Also, if you have any comments regarding the time estimates associated with this study or suggestions on making this process simpler, please write to:

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IRS.gov 2006 Nationwide Tax Forum (NTF) Usability Study

Attachments

1. *Telephone/Participant Screeners*
IRS.gov Nationwide Usability Study

Individuals Screener
Job

First Name:		**Date**	
Last Name:			
Male / Female (NOTE AT START):			
Address/Location:			
Telephone #'s:		**Appt date**	
Interviewer:		**Appt time**	
Comments:			

Hello, I'm _____ from Consumer Opinion Services calling on behalf of the Internal Revenue Service. The IRS wants to hear from you. Have you heard about the website IRS .gov? What we would like to do is ask you a few questions to see if you would be able to participate in a 60 minute evaluation of an IRS web site to be scheduled during the week of [DATE OF TESTING]. We would pay you to come to the IRS testing room at the 2006 Tax Forum location and provide your feedback and input on how well it works. Would you be willing to answer a few questions to see if you qualify?

If NO, schedule time to call back. If Yes, continue.
Reference the OMB Control Number and PRA Statement below before continuing

The Paperwork Reduction Act requires that the IRS display an OMB control number on all public information requests. The OMB Control Number for this study is #1545-1349. Also, if you have any comments regarding the time estimates associated with this study or suggestions on making this process simpler, please write to:
    Internal Revenue Service

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Washington, DC 20224

Because we are seeking a wide variety of people, let me start by asking you some questions about yourself...

1. Are you currently registered to attend the 2006 Nationwide Tax Forum in XXXXX city? **IF YES END INTERVIEW**

2. Have you ever taken part in a market research interview or usability study, either one on one or in a focus group type setting? **IF NO SKIP TO Q3**

3. When was the last time you participated in a market research interview or usability study? **END INTERVIEW IF LESS THAN 6 MONTHS**

4. Do you or any member of your immediate family currently work for or did they ever work for any of the following?

___ Marketing, Market Research Firm	
___ Advertising	**IF YES TO ANY END INTERVIEW**
___ Web Site Design Company	

___ For a city, state or federal government agency? If so, which one?

   IF IRS, END INTERVIEW

5. Do you have access to the internet where you can use it for your own personal use?
   Yes
   NO   END INTERVIEW

6. On a scale of 1 to 5 where 1 means 'not at all comfortable' and 5 means 'very comfortable', how comfortable are you with...   **END INTERVIEW IF 1 OR 2**

using a mouse	1	2	3	4	5
using a keyboard	1	2	3	4	5
using the Internet	1	2	3	4	5

7. Do you use the Internet to do any of the following?

e-commerce (web shopping)	YES	NO
web site surfing	YES	NO
pay bills online	YES	NO
work related reasons	YES	NO
research	YES	NO
online banking	YES	NO
pay taxes online/software	YES	NO

8. Are you employed?

___ Full time or Part Time outside the home	NEED 4

__	Self employed/Small Business Owner	**USE BUSINESS QUESTIONNAIRE**

If employed:
What industry are you in? _____

What is your occupation? _____

GET A GOOD MIX OF DIFFERENT OCCUPATIONS AND INDUSTRIES

If Not Employed: **2 MAXIMUM NOT EMPLOYED**

__	Retired
__	Student
__	Homemaker
__	In between jobs

9. What is the highest level of education you have completed?
    DO NOT READ ANSWER CHOICES - GET A MIX

__	Some high school or less	**END INTERVIEW**
__	High school graduate	**CONTINUE**
__	Some college, vocational or trade school	**CONTINUE**
__	College graduate	**CONTINUE**
__	Graduate school	**CONTINUE**

10. Can you please tell me which of the following categories your age falls into?

Under 20	**END INTERVIEW**
21-29	**NO MORE THAN 2**
30-39	**CONTINUE**
40-49	**CONTINUE**
50-59	**CONTINUE**
60-65	**CONTINUE**
66+	**NO MORE THAN 1**

11. On a scale of 1 to 5 where 1 is 'not at all knowledgeable' and 5 is 'extremely knowledgeable', how much do you know and understand about federal income taxes and procedures, i.e. filling out tax forms, etc.

1	2	3	4	5	**GET A MIX - END INTERVIEW IF 1**

12. Have you ever visited the website IRS.gov?
    YES
    NO SKIP TO Q17

13. What was the nature of your visit to the website?

__	to find forms
__	to review tax regulations
__	to find phone numbers
__	file downloads
.	online tax tools

___	other_____

14. Approximately how long was the duration of time for your visit to the website?

___	less than 15 minutes
___	15 minutes to 30 minutes
___	30 minutes to 1 hour
___	longer than 1 hour

15. How many times have you visited the website? _____

16. Was the information you were seeking on the website different depending on the season? (such as quarterly filing or investigating withholding changes)
   YES   NO

17. What ways have you ever contacted the IRS aside from the website?

___	visited a local branch	___
___	phone call	
___	spoken with a specific representative	

Thank you, the following questions are for classification purposes only.

18. What is your current marital status? **RECRUIT A MIX**

___	Single
___	Married/Living with partner
___	Widowed
___	Divorced/Separated

19. Do you use assistive technology, such as a screen reader, to access a computer or do you have a condition which makes it more difficult for you to use a computer without making adjustments?
   YES Recruit at least 1 Person in any of the three user groups who is a Screen Reader user
   NO

   People with the following conditions would be wonderful to include:
   - Low vision
   - Hand stability issues such as Parkinson's, arthritis, etc.
   - Cognitive disability, Literacy issues and/or ESL (Spanish is first language)

   Recruit to obtain the following targeted occupations:
   a. Retired/or Senior Citizen ....1 Maximum
   b. Student, homemaker, underemployed, etc...........................1 Maximum
   d. Employed ....4+

   Mix of men and women
   Keep a bank of holds in case we have no shows on the first three days

Thank you for answering my questions. As you can imagine, this survey was part of a larger research project. Your responses to the questions I have asked have prompted me to inquire if you would be interested in further helping by participating in a website usability study. You will receive $75.00, simply for sharing more of your opinions with us in a 60 minute interview.

This is strictly a research project, and we do not, and are not selling anything, ever. We also want you to know that the IRS will NOT in anyway use your personal information for anything other than the strict usage of it for this particular website study. They will not record your name or personal information. The IRS is just interested in finding out your opinions on website navigation styles and if they help taxpayers or not. If you are asked to provide personal information it will be kept sealed and used just for this research study.

These interviews will be held on (DATE, TIME) at the various cities of the 2005 Tax Forums. They will last approximately 1 Hour. Would you be available for that particular date and time?

No.. ☐ **Politely Discontinue**
Yes .... ☐ **Continue**

Do you have any questions up to this point or special needs for coming to our facility?
(Answer inquiries appropriately and thoroughly)

Again, let me thank you for your participation. This research is important to all of us, and your help and participation is highly appreciated. Here are the rest of the steps in the process:

After I have gathered your information, we will mail you a confirmation letter and map to the IRS testing facility. You will also receive a follow-up / reminder call prior to the interviews. In a moment, I will need your name and address, as well as a phone number where you can be reached during the day and in the evening.

We will give you a reminder call prior to your scheduled appointment on (date) (time) to re- We will give you a reminder call prior to your scheduled appointment on (date) (time) to re-confirm that you will be attending and that you have no further questions. If we are unable to reach you and we leave a message, please call us back. Because we only schedule a limited number of sessions, and invite a limited number of research participants, it is our policy to continue calling until we do confirm your attendance.

Should something change in your participation availability, please phone our call center at 1-888-xxx-xxxx and reference "XXXXXX".

IRS.gov Nationwide Usability Study

Tax Professionals Screener
Job

First Name:		Date	
Last Name:			
Male / Female (NOTE AT START):			
Address/Location:			
Telephone #'s:		Appt date	
Interviewer:		Appt time	
Comments:			

Hello, I'm _____ from the Internal Revenue Service. We are talking to people who conduct professional tax preparations. The IRS wants to hear from you. Have you heard about the website IRS .gov? What I would like to do is ask you a few questions to see if you would be able to participate in a 60 minute evaluation of an IRS web site. Would you be willing to answer a few questions to see if you qualify?

If NO, schedule time to call back. If Yes, continue.
Reference the OMB Control Number and PRA Statement below before continuing

The Paperwork Reduction Act requires that the IRS display an OMB control number on all public information requests. The OMB Control Number for this study is #1545-1349. Also, if you have any comments regarding the time estimates associated with this study or suggestions on making this process simpler, please write to:
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Because we are seeking a wide variety of people, let me start by asking you some questions about your experience…

1. Do you currently conduct professional tax preparations? YES **NO - END INTERVIEW**

2. On a scale of 1 to 5 where 1 means 'not at all comfortable' and 5 means 'very comfortable', how comfortable are you with…   **END INTERVIEW IF 1 OR 2**

	1	2	3	4	5
IRS jargon (IRM, PTIN, EFTPS, etc.)	1	2	3	4	5
preparing both 1040 and business clients	1	2	3	4	5
preparing complex returns (multiple W-2s, 1099s, deductions, etc.)	1	2	3	4	5

3. What size of tax preparation company do you work for? **RECRUIT A MIX IF POSSIBLE**

__	1 – 10 Employees
__	10 – 50 Employees
__	50 – 1000 Employees
__	1000 + Employees

4. Have you ever taken part in a market research interview or usability study, either one on one or in a focus group type setting?   **NO - SKIP TO Q5**

5. When was the last time you participated in a market research interview or usability study? **END INTERVIEW IF LESS THAN 6 MONTHS**

6. Do you or any member of your immediate family currently work for or did they ever work for any of the following?

__	Marketing, Market Research Firm
__	Advertising
__	Web Site Design Company

IF YES TO ANY END INTERVIEW

__	For a city, state or federal government agency? If so, which one?

IF IRS, END INTERVIEW

7. Do you have access to the internet at your company? **NO - END INTERVIEW**

8. On a scale of 1 to 5 where 1 means 'not at all comfortable' and 5 means 'very comfortable', how comfortable are you with…   **END INTERVIEW IF 1 OR 2**

using a mouse	1	2	3	4	5
using a keyboard	1	2	3	4	5
using email	1	2	3	4	5
using the Internet	1	2	3	4	5

9. Do you use the Internet to do any of the following?

e-commerce (web shopping)	YES	NO

web site surfing	YES	NO
pay bills online	YES	NO
work related reasons	YES	NO
research	YES	NO
online banking	YES	NO
pay taxes online/software	YES	NO

10. Have you ever visited the website IRS.gov?
    YES
    NO   SKIP TO Q16

11. What was the nature of your visit to the website?

__	to find forms
__	to review tax regulations
__	to find phone numbers
__	file downloads
__	online tax tools
__	other_____

12. Approximately how long was the duration of time for your visit to the website?

__	less than 15 minutes
__	15 minutes to 30 minutes
__	30 minutes to 1 hour
__	longer than 1 hour

13. How many times have you visited the website? _____

14. Was the information you were seeking on the website different depending on the season? (such as quarterly filing or investigating withholding changes)
    YES   NO

15. What ways have you ever contacted the IRS aside from the website?

__	visited a local branch
__	phone call
__	spoken with a specific representative

16. Do you use assistive technology, such as a screen reader, to access a computer or do you have a condition which makes it more difficult for you to use a computer without making adjustments?
    YES Recruit at least 1 Person in any of the three user groups who is a Screen Reader user
    NO

    People with the following conditions would be wonderful to include:

Low vision
Hand stability issues such as Parkinson's, arthritis, etc.
Cognitive disability, Literacy issues and/or ESL (Spanish is first language)
Recruit to obtain 3 Paid Tax Preparers / Tax Professionals

Mix of men and women
Keep a bank of holds in case we have no shows on the first three days
Keep the last day open for the holds if needed

Thank you for answering my questions. As you can imagine, this survey was part of a larger research project. Your responses to the questions I have asked have prompted me to inquire if you would be interested in further helping by participating in a research project. This is strictly a research project, and we do not, and are not selling anything, ever.

This is how our process works: As part of our research, we will be conducting interviews with a number of people similar to yourself. You would be attempting tasks on a web site and discussing your experiences with that web site. Let me stress again that these interviews are for research purposes only – we just want your opinions.

These interviews will be held on (DATE, TIME) in XXXXX conference room. They will last approximately 60 minutes. Would you be available for that particular date and time?

NO	☐	**POLITELY DISCONTINUE**
YES	☐	**CONTINUE**

Do you have any questions up to this point?
(Answer inquiries appropriately and thoroughly).

Again, let me thank you for your participation. This research is important to all of us, and your help and participation is highly appreciated.

IRS.gov Nationwide Usability Study

Business Screener
Job

First Name:		**Date**	
Last Name:			
Male / Female (NOTE AT START):			
Address/Location:			
Telephone #'s:		**Appt date**	
Interviewer:		**Appt time**	
Comments:			

Hello, I'm _____ from Consumer Opinion Services, Inc. On behalf of the Internal Revenue Service we are currently seeking out decision makers and persons who have involvement with the tax preparations for their place of business. The IRS wants to hear from you. Have you heard about the website IRS.gov? What we would like to do is ask you a few questions to see if you would be able to participate in a 60 minute evaluation of an IRS web site to be scheduled during the week of [DATE OF TESTING]. We would pay you to come to the IRS testing room at the 2006 Tax Forum location and provide your feedback and input on how well it works. Would you be willing to answer a few questions to see if you qualify?

If NO, obtain referral and and schedule time to call back. If Yes, continue.
Reference the OMB Control Number and PRA Statement below before continuing

The Paperwork Reduction Act requires that the IRS display an OMB control number on all public information requests. The OMB Control Number for this study is #1545-1349. Also, if you have any comments regarding the time estimates associated with this study or suggestions on making this process simpler, please write to:
Internal Revenue Service
Tax Products Coordinating Committee
SE:W:CAR:MP:T:T:SP
1111 Constitution Ave. NW

Washington, DC 20224

Let me start by asking you some questions about yourself...

1. Are you currently registered to attend the 2006 Nationwide Tax Forum in XXXXX city? **IF YES END INTERVIEW**

2. Would you consider yourself to be directly involved in preparing and filing your company's federal taxes or in decision making regarding tax issues?

YES	
NO	**Obtain referral and ask to speak with the appropriate person – otherwise terminate.**

3. ow would you rate yourself on a scale of 1 to 5 where 1 would be you completely agree and 5 would mean you disagree completely

   I know what tax forms the company needs to file by what dates.
   I understand the tax laws and rules that apply to the company.
   BOTH MUST BE 1-3
   ONE MUST BE 1-2 IN ORDER TO CONTINUE.

4. Have you ever taken part in a market research interview or usability study, either one on one or in a focus group type setting? **NO - SKIP TO Q5**

5. When was the last time you participated in a market research interview or usability study? **END INTERVIEW IF LESS THAN 6 MONTHS**

6. Do you or any member of your immediate family currently work for or did they ever work for any of the following?

__	Marketing, Market Research Firm	**IF YES TO ANY END INTERVIEW**
__	Advertising	
__	Web Site Design Company	

__	For a city, state or federal government agency? If so, which one?

   IF IRS, END INTERVIEW

7. Do you have access to the internet? **NO - END INTERVIEW**

8. On a scale of 1 to 5 where 1 means 'not at all comfortable' and 5 means 'very comfortable', how comfortable are you with...   **END INTERVIEW IF 1 OR 2**

using a mouse	1	2	3	4	5
using a keyboard	1	2	3	4	5
using email	1	2	3	4	5
using the Internet	1	2	3	4	5

9. Do you use the Internet to do any of the following?

e-commerce (web shopping)	YES	NO
web site surfing	YES	NO
pay bills online	YES	NO
work related reasons	YES	NO
research	YES	NO
online banking	YES	NO
pay taxes online/software	YES	NO

10. Have you ever visited the website IRS DOT GOV?
    YES
    NO   SKIP TO Q14

11. What was the nature of your visit to the website?

__	to find forms
__	to review tax regulations
__	to find phone numbers
__	file downloads
__	online tax tools
__	other_____

12. Approximately how long was the duration of time for your visit to the website?

__	less than 15 minutes
__	15 minutes to 30 minutes
__	30 minutes to 1 hour
__	longer than 1 hour

13. How many times have you visited the website? _____

14. Was the information you were seeking on the website different depending on the season?
    (such as quarterly filing or investigating withholding changes)
    YES   NO

15. What ways have you ever contacted the IRS aside from the website?

__	visited a local branch
__	phone call
__	spoken with a specific representative

Thank you, the following questions are for classification purposes only.

16. What industry is your company in? _____

Get a good mix of different industries

17. What is the legal structure of your company, for example corporation, LLC, partnership, sole proprietorship? _____.___

18. Does your company have any offices outside the USA?
Yes
No

19. Are your company's total assets greater than $10 million?
Yes
No

20. What is the highest level of formal education you have completed?
DO NOT READ ANSWER CHOICES - GET A MIX

__	Some high school or less	**END INTERVIEW**
__	High school graduate	CONTINUE
¬	Some college, vocational or trade school	CONTINUE
__	College graduate	CONTINUE
__	Graduate school	CONTINUE

21. Can you please tell me which of the following categories your age falls into?

Under 18	**END INTERVIEW**
21-26	**NO MORE THAN 2**
26-39	CONTINUE
40-49	CONTINUE
50-59	CONTINUE
60-65	CONTINUE
66+	**END INTERVIEW**

22. Do you use assistive technology, such as a screen reader, to access a computer or do you have a condition which makes it more difficult for you to use a computer without making adjustments?
YES Recruit at least 1 Person in any of the three user groups who is a Screen Reader user
NO

People with the following conditions would be wonderful to include:
- Low vision
- Hand stability issues such as Parkinson's, arthritis, etc.
- Cognitive disability, Literacy issues and/or ESL (Spanish is first language)

Recruit to obtain 3 participants from a mix of Small Business owners or Self-Employed

Mix of men and women

Keep a bank of holds in case we have no shows on the first three days
Keep the last day open for the holds if needed

Thank you for answering my questions. As you can imagine, this survey was part of a larger research project. Your responses to the questions I have asked have prompted me to inquire if you would be interested in further helping by participating in a paid research project. You will receive $75, simply for sharing more of your opinions with us in a 60 minute interview. This is strictly a research project, and we do not, and are not selling anything, ever.

This is how our process works: As part of our research, we will be conducting interviews with a number of people in your area similar to yourself. You would be attempting tasks on a web site and discussing your experiences with that web site. Let me stress again that these interviews are for research purposes only – we just want your opinions.

These interviews will be held on (DATE, TIME) at XXXXX. They will last approximately 60 minutes. Would you be available for that particular date and time?

| NO | ☐ | POLITELY DISCONTINUE |
| YES | ☐ | CONTINUE |

Do you have any questions up to this point?
(ANSWER INQUIRIES APPROPRIATELY AND THOROUGHLY).

Again, let me thank you for your participation. This research is important to all of us, and your help and participation is highly appreciated. Here are the rest of the steps in the process:

After I have gathered your information, we will mail you a confirmation letter and map to our facility. You will also receive a follow-up / reminder call prior to the interviews. In a moment, I will need your name and address, as well as a phone number where you can be reached during the day and in the evening.

We will give you a reminder call prior to your scheduled appointment on (date) (time) to re-confirm that you will be attending and that you have no further questions. If we are unable to reach you and we leave a message, please call us back. Because we only schedule a limited number of sessions, and invite a limited number of research participants, it is our policy to continue calling until we do confirm your attendance.

Should something change in your participation availability, please phone our call center at 1-888-xxx-xxxx and reference "XXXXX".

2. Confirmation Letter

Consumer Opinion Services, Inc.

July, 2006

Dear _____,

Thank you for agreeing to participate in our upcoming research usability study for the Internal Revenue Service about feedback of the IRS.gov Web site. We want to assure you that this is only a research study and your identity remains anonymous. During the study we will ask you to navigate a website to ensure it is helpful to taxpayers. Your appointment is as follows:

DATE:	***(insert date)***
LOCATION:	***IRS 2005 Tax Forum City ?***
TIME:	(insert time)
LENGTH:	***3 hours (including travel time and 60 minute interview)***
HONORARIUM:	***$75.00***
STUDY TITLE:	IRS.gov Nationwide Usability Study
DIRECTIONS:	Provide 2006 Tax Forum City and Hotel Location
	Contact Liz Baker at 202-283-7847 if you get lost.
	See enclosure

Please check in 15 minutes before the session start time to ensure that we proceed on schedule.

We have invited only a limited number of people, about 12, and we are counting on your timely attendance and participation for completion of our study. There is no back up person to participate if you do not show up to the research study, so it is very important that you keep your commitment. You will be alone in a conference room with a moderator and the IRS staff will be observing you while you are reviewing the website. Your opinions are very important to the IRS, as they will act on what you have to say. *If for any reason you cannot make this appointment, call us upon receipt of this letter so that we may find a replacement for you before the day of the study.*

Please bring your photo ID upon check-in. If you use reading glasses, please bring these with you. Because of limited space, please do not bring children or others along with you, as we will not be able to accommodate them. If you need to bring an assistant to help you please contact us to make arrangements. Only the people we have contacted are accepted in to the research study.

All of our interviews are conducted strictly for research. At no time will someone attempt to sell you any product or service, nor will your name be supplied to any manufacturer for sales purposes.

Your honorarium will be paid at the end of your interview. Again, thank you for your time, and remember, your opinion counts!

Sincerely,
Beth Fitzpatrick, Call Center Manager

3. Moderator Checklist

1. Look at and remember person's name prior to going to meet him/her.
2. Introduce yourself and other team members who might interact with participant (i.e., logger, observation facilitator).
3. Ask if person would like something to drink and/or to use the restroom.
4. Ask person to read and sign the consent form.
5. Reference the OMB Control Number and PRA Statement:

   The Paperwork Reduction Act requires that the IRS display an OMB control number on all public information requests. The OMB Control Number for this study is #1545-1349. Also, if you have any comments regarding the time estimates associated with this study or suggestions on making this process simpler, please write to:

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   1111 Constitution Ave. NW
   Washington, DC 20224

6. Talking points to cover in verbal session overview:
   - Discuss the purpose of usability testing / this usability study.
   - Inform that the session will be videotaped and audio taped (as mentioned in consent form).
   - Ask person to wear microphone (if applicable).
   - Explain that people will be observing (and remotely, if applicable) and that they will see what is happening on the computer screen and the video from the video camera.
   - Remind participant to "think-aloud" – ask the participant to provide a running commentary about what he/she is doing at all times in the site, and that it may seem awkward but to try to talk as much as possible.
   - Remind that (s)he is helping us evaluate the site—we are not evaluating him/her

7. Instruct the participant to read the first page of the participant package.
8. Ask the participant if (s)he has any questions.
9. Ask the participant to turn the page and complete the preliminary question about information (s)he typically would want to find on IRS.gov.
10. Ask the participant to turn the page and read the first task aloud.
11. After each task, ensure that participant completes the post-task questions and discuss his/her responses with him/her.
12. After each task, check whether more than 15 minutes of session time remains. If so, let participant proceed to next task. If not, ask him/her to respond to design and do an "exploration" task where the participant can look through other sections – observe navigation technique.
13. Ensure that participant completes post-study questionnaire and discuss his/her responses with him/her. Ask if (s)he has any other comments about the site.
14. Have participant sign receipt form and record honorarium check number on signed form.

4. Participant Consent Form

The purpose of this study is to help us evaluate the new design for the IRS.gov Web site. We would like you to help us identify ways we can change the design to make finding information easier. By participating in this study, you will help us shape the future of the IRS.gov Web site.

This session will take approximately 1 hour. You will be given a brief questionnaire to find out more about your previous web experiences. While you evaluate the Web site, you will be asked to perform specific tasks and answer some questions after each task is performed. The session will be recorded using microphones, a video camera, and a device to capture the computer screen.

You may experience frustration and confusion during the test. The Search function will not be working, but all content will be in the site. You may ask questions at any time during the study, but please note that due to the type of information we are trying to collect, we may not be able to fully answer your question until after the study.

If you do not want to be in this study, you do not have to participate. You do not have to answer any questions you do not want to, and you may stop at any time without any consequences. All information that you provide in this research study will be kept confidential and any report of this research will not identify you personally in any way.

If you agree to help us, please sign below.

_____   _____
(Signature)   *(Date)*

_____
(Print Name)

Paperwork Reduction Act (PRA) Statement:
The Paperwork Reduction Act requires that the IRS display an OMB control number on all public information requests. The OMB Control Number for this study is OMB #1545-1349. Also, if you have any comments regarding the time estimates associated with this study or suggestions on making this process simpler, please write to the:
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  Washington, DC 20224

5. Scenarios

Task for all participants before beginning study:
Please list the types of information that you personally might typically want to find on the IRS.gov Web site, using a separate line for each item.

Task Scenarios: Individuals

1. You are a resident of Tennessee and need to know where to send your taxes. You have completed the 1040EZ form and are enclosing a payment. What address would you send your form and payment to?
Target – "IRS E-File" < "Where to File" < "Where to file addresses for individual taxpayers by state" < TN OR "Skip to State links" < "Tennessee" OR "TENNESSEE - Where to File Addresses for Individual Taxpayers 1040EZ"

2. You learn from a friend that you are now able to make e-payments for your taxes. You want to pay by credit card and are unsure if you have all the information necessary to do this. Where would you go to find this information?
Target = "E-File" < "Electronic Payment Options" < "Credit Card" OR "Search: 'Pay by credit card'" "Credit Card"

4. Your yearly income is $32,000 a year. You found out from an IRS help line that you are eligible to file online for free. How would you do this?
Target = "E-file" < "e-file for individual taxpayers" < "Filing your taxes was never easier" < "free file" < "start now" OR "Search: file taxes for free" < "Free internet filing options" < "Start now"

5. You have money in a Roth IRA and are wondering if you are unsure if you have to report your nondeductbible contributions. Using the FAQ link where would you find the answer to your question?
Target – "More online tools" < "Frequently asked questions" < "Keyword" < "R" < "Roth IRA" OR "Category" < "Individual retirement arrangements" < "Roth IRA"

6. You are a Canadian citizen both living and working in the United States. You are unsure if you need to file a US tax return or a Canadian tax return or both. Where would you go to find this information?
Target – "More online tools" < "Frequently asked questions" < "Keyword" < "Aliens and US Citizens living abroad"

7. You are a student who is at the IRS site because you have no idea where to look to find information about FAFSA. Using the IRS.gov FAQ's find the link to the FAFSA webite.
Target = "More online tools" < "Frequently Asked Questions" < "Keyword: S" < "Student" < "Tax information for students" < "Free Application for Federal Student Aid"

8. You are just about done with your son's taxes and realize you cannot finish them without finding out about what to do about his trust fund. You have already read through the FAQ's and found no answer your questions. Your last hope is to call the tax assistance line. How would you go about doing this?
Target = "Contact IRS" < "Contact the IRS.gov Help Desk" < "Help with tax questions"

9. You get a notice in the mail from the IRS letting you know you are being investigated. You don't believe you have done anything wrong. You call the help line and they tell you to look on the website and find the organization within the IRS that helps taxpayers with problems such as these. Where on the IRS.gov website would you find this organization, what are they called, and who heads it?
Target – "Contact IRS" < "Taxpayer Advocate" < "Taxpayer advocate services" < "Have a tax problem, need help?"

10. You have a babysitter, and once a week he/she cleans as part of her duties. He/She doesn't live with you and you are unsure if they are considered a household employee or not. Find your answer using search.

Target = "Search: babysitter" < "Publication 926 (12-2005), household employers tax guide" < "Do you have a household employee?"

11. You are about to receive some assets because of a loss in your family. You need to fill out a form for tax purposes but are unsure of the form you need to fill out for taxes. Using search find the form number and the instructions for the form.

Target = "Advanced Search" < Assets acquisition Forms and Instructions" < "Instruction 8594 (PDF)" OR "Form 8594"

12. You are being brave, and this year, you have decided to do your own taxes. You wonder whether the IRS has some sort of instructions or guide that could help you out if you have any questions. Using search, find the information.

Target = "Search: tax guide" < "IRS publication 17-Free Tax guide for individuals" < "Publication 17, your federal income tax"

Final Task (when 15 minutes left): Review the list you created of the types of information that you personally might typically want to find on the IRS.gov Web site. Choose one item and locate it on the IRS.gov site.

Task Scenarios: Tax Professionals

1. Your client is a resident of Tennessee and you need to know where to send his tax return to. You have completed the 1040EZ form and are enclosing a payment. What address would you send the form and payment to?
Target = "IRS E-file" < "Where to File" < "Who where to File addresses for individual taxpayers by state" < "TN" OR "Skip to State links < Tennessee" OR "TENNESSEE < Where to File Addresses for Individual Taxpayers 1040EZ"

2. Recently you heard from a co-worker that you are now eligible to e-file your clients taxes. Using e-file how would you go about applying for this?
Target = "Tax Professionals" < "e-services-Online tools for tax professionals" < "IRS e-file made easy – A tax professional's one stop e-file and e-pay shop" < "IRS e-file Application process: Step1 - How to apply"

3. You have already flied a return for your client and you now have to go before the IRS and represent your client. You schedule is busy so you would rather do all of it online. You are aware of the Electronic Account Resolution, but are not sure if this is exactly what you need. Find this resolution online, and is it necessary for one to be a participant of the e-file program?
Target = "Tax Professionals" < "Basic Tools for tax pro" < "E-Services Electronic Account Resolution" < "Scroll down to Electronic Account Resolution"

4. Your client has money in a Roth IRA and you are unsure if you have to report their non-deductible contributions. Using the FAQ link where would you find the answer to your question?
Target = "More online tools" < "Frequently asked questions" < "Keyword" < "R" < "Roth IRA" OR "Category" < "Individual retirement arrangements" < "Roth IRA"

5. Your client is a Canadian citizen both living and working in the United States. You are unsure if you need to file a US tax return or a Canadian tax return or both. Where would you go to find this information?
Target – "More online tools" < "Frequently asked questions" < "Keyword" < "Aliens and US Citizens living abroad"

6. A client you did taxes for last year calls you and states that he/she feels that someone may have filed a return using their social security number because the IRS is calling and wants to know why 2 returns were filed with the same SSN. You want to help your worried client, but aren't 100% sure one what exactly to do. Using the FAQ find the answer so that you can help your client.
Target – "More online tools" < "Frequently asked questions" < "FAQ by subcategory" < "Reporting Fraud"

7. Your client's taxes are just about completed and you realize you cannot finish them without finding out about what to do about his trust fund. You have already read through the FAQ's and found no answer your questions. Your last hope is to call the tax assistance line. How would you go about doing this?
Target – "Contact IRS" < "Contact the IRS.gov Help Desk < Help with tax questions"

8. Your client has a babysitter, and once a week he/she cleans as part of her duties. He/She doesn't live with you and you are unsure if they are considered a household employee or not. Find your answer using search.
Target – "Search < site" < "Publication 926 (12 ?) < household employers tax guide" < "Do you have a household employee?"

9. Your client is about to receive some assets because of a loss in their family. You need to fill out a form for tax purposes but are unsure of the form you need to fill out for taxes. Using search find the form number and the instructions for the form.
Target – "Advanced < search < Assets acquisition, < < < < < < < < < " < "Instruction 8594 (PDF)" OR "Form 8594"

10. Your client comes to you and believes they're eligible for earned income tax credit for the year 2005. Using search find out how you can help your client figure out if they are eligible for EITC.

Target = "Search → Earned Income Tax Credit → Earned Income Tax Credit - Should I File for Tax Year 2005 English" → Select Icon. Am I eligible?"

Final Task (when 15 minutes left): Review the list you created of the types of information that you personally might typically want to find on the IRS.gov Web site. Choose one item and locate it on the IRS.gov site.

Reference the OMB Control Number and PRA Statement as noted below:

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**Internal Revenue Service
Tax Products Coordinating Committee
SE:W:CAR:MP:T:T:SP
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Washington, DC 20224**

Task Scenarios: Business

1. Your client is a resident of Tennessee and you need to know where to send his tax return to. You have completed the 1040EZ form and are enclosing a payment. What address would you send the form and payment to?
Target = "IRS E-File" < "Where to File" < "Where to file addresses for individual taxpayers by state" < "TN" OR "Skip to State links < "Tennessee" OR "TENNESSEE - Where to File Addresses for Individual Taxpayers 1040EZ"

2. Recently you heard from a co-worker that you are now eligible to e-file your clients taxes. Using e-file how would you go about applying for this?
Target = "Tax Professionals" < "e-services-Online tools for tax professionals" < "IRS e-file made easy - A tax professional's one stop e-file and e-pay shop" < "IRS e-file Application process' Step1 How to apply"

3. You have already flied a return for your client and you now have to go before the IRS and represent your client. You schedule is busy so you would rather do all of it online. You are aware of the Electronic Account Resolution, but are not sure if this is exactly what you need. Find this resolution online, and is it necessary for one to be a participant of the e-file program?
Target = "Tax Professionals" < "Basic Tools for tax pro" < "E-Services Electronic Account Resolution" < "Scroll down to Electronic Account Resolution"

4. Your client has money in a Roth IRA and you are unsure if you have to report their non-deductible contributions. Using the FAQ link where would you find the answer to your question?
Target = "More online tools" < "Frequently asked questions" < "Keyword" < "R" < Roth IRA" OR "Category" < "individual retirement arrangements" < "Roth IRA"

5. Your client is a Canadian citizen both living and working in the United States. You are unsure if you need to file a US tax return or a Canadian tax return or both. Where would you go to find this information?
Target = "More online tools" < "Frequently asked questions" < "Keyword" < "Aliens and US Citizens living abroad"

6. A client you did taxes for last year calls you and states that he/she feels that someone may have filed a return using their social security number because the IRS is calling and wants to know why 2 returns were filed with the same SSN. You want to help your worried client, but aren't 100% sure one what exactly to do. Using the FAQ find the answer so that you can help your client.
Target = "More online tools" < "Frequently asked questions" < FAQ by subcategory < "Reporting Fraud"

7. Your client's taxes are just about completed and you realize you cannot finish them without finding out about what to do about his trust fund. You have already read through the FAQ's and found no answer your questions. Your last hope is to call the tax assistance line. How would you go about doing this?
Target = "Contact IRS" < "Contact the IRS.gov Help Desk"< "Help with tax questions"

8. Your client has a babysitter, and once a week he/she cleans as part of her duties. He/She doesn't live with you and you are unsure if they are considered a household employee or not. Find your answer using search.
Target = Search and "Publication 926 (12.2005), Household employers" < "Do you have a household employee?"

9. Your client is about to receive some assets because of a loss in their family. You need to fill out a form for tax purposes but are unsure of the form you need to fill out for taxes. Using search find the form number and the instructions for the form.
Target = Assets < "Forms and Instructions" < (PDF)" OR "Form 8"

10. Your client comes to you and believes they're eligible for earned income tax credit for the year 2005. Using search find out how you can help your client figure out if they are eligible for EITC.

Target – Search: Earned Income Tax Credit — Earned Income Tax Credit – Should I apply? – Tax Year 2005 English" – Start time: Am I eligible

Final Task (when 15 minutes left): Review the list you created of the types of information that you personally might typically want to find on the IRS.gov Web site. Choose one item and locate it on the IRS.gov site.

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Internal Revenue Service
Tax Products Coordinating Committee
SE:W:CAR:MP:T:T:SP
1111 Constitution Ave. NW
Washington, DC 20224

IRS.gov 2006 Nationwide Tax Forum (NTF) Usability Study
Individuals Participant Package

MODERATOR GUIDE

1. Introduction

Today you will be evaluating a proposed redesign of IRS.gov. We appreciate you taking time out of your day to help us improve the quality and usefulness of this application.

During the evaluation, you will be asked to perform a few typical tasks. Use the site as you might—or do—use it at home or at work and let us know what you are thinking as you go along. Your feedback during this test session is vital: It will help shape the future application. Please comment freely on anything you observe. Both positive and negative comments are welcome!

This session will be videotaped using microphones, a video camera, and a device to videotape the computer screen. Additionally, another person will be taking notes behind the mirror. These recordings will only be used for purposes of data analysis.

Please note that the Paperwork Reduction Act requires that the IRS display an OMB control number on all public information requests. The OMB Control Number for this study is #1545-1349. Also, if you have any comments regarding the time estimates associated with this study or suggestions on making this process simpler, please write to:

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Important Guidelines:

While you are completing the tasks:

- Think out loud. Tell us what's going on while you are attempting a task. For example:

   "I'm having trouble doing this task because I cannot figure out where to go to do it. I thought I'd find a link to XYZ on the home page, but it doesn't seem to be there..."

   "No problem; it was obvious that clicking on the XYZ link would take me to this page which completes the task."

There is also space in this package for you to add additional written comments.

- If you have trouble with a task:
   1. Tell us what is happening and why it's different than you expected.
   2. Tell us what you did to try to overcome the problem.
   3. Ask the administrator for help if you cannot proceed further.
      (However, try to think of the administrator as a friend you would have to call.)
   4. Let us know when you think you'd normally stop and just call the IRS instead or if you'd just try again another time.

- Work at your own pace. Remember that we're evaluating the Web site – we're not evaluating you. If you have trouble, it probably means there is something we need to improve in the design.

- The facilitator may from time to time ask questions about what you're doing or thinking, or remind you to think out loud.

Remember that if at any point during the session you feel you need to end the session and leave, you are of course free to do so.

Do you have any questions before we start?

Participant's Name: _____   **Date:** _____

2. Types of Information You Typically Want to Find _____

Before we get started with the tasks, please list the types of information that you personally might typically want to find on the IRS.gov Web site, using a separate line for each item:

_____

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4. Tasks

Now we will start the session. Please perform the tasks using the application unless asked otherwise. *After performing a task*, please answer the questions below the task on the page.

Task One:

You are a resident of Tennessee and need to know where to send your taxes. You have completed the 1040EZ form and are enclosing a payment. What address would you send your form and payment to?

Target:

Target = "IRS E-File" < "Where to File" < "Where to file addresses for individual taxpayers by state" < "TN" OR "Skip to State links" < "Tennessee" OR "TENNESSEE - Where to File Addresses for Individual Taxpayers 1040EZ"

Comments:

Please answer the following questions and statements **based on the task you just attempted.**

1. Please comment on your first impression of the web site:

    Comments:

2. If this web site had informed your first opinion, what might you think of the IRS?

    Comments:

3. Was there anything you particularly liked (or disliked) about your first impression?

    What you liked:

    What you disliked:

Task Two:

You learn from a friend that you are now able to make e-payments for your taxes. You want to pay by credit card and are unsure if you have all the information necessary to do this. Where would you go to find this information?

Target:

Target : E-File' < "Electronic Payment Options" < "Credit Card" OR "Search, 'Pay by credit card'" > 'Credit Card'

Success: Yes / No

Comments:

Please answer the following questions and statements **based on the task you just attempted.**

1. How easy or difficult was it to complete this task.

   ❑ Very Difficult   ❑ Difficult   ❑ Somewhat Difficult   ❑ Neutral   ❑ Somewhat Easy   ❑ Easy   ❑ Very Easy

   Comments:

2. If I had to perform this task in real life, I would visit this site to perform it (as opposed to calling or some other method).

   ❑ Strongly Disagree   ❑ Disagree   ❑ Somewhat Disagree   ❑ Neutral   ❑ Somewhat Agree   ❑ Agree   ❑ Strongly Agree

   Comments:

3. Was there anything you particularly liked (or disliked) about the way you were able to (or unable to) perform this task?

   What you liked: _____

   What you disliked: _____

Task Three:
Your yearly income is $32,000 a year. You found out from an IRS help line that you are eligible to file online for free. How would you do this?

Target:

Target = "E-file" > "e-file for individual taxpayers" > "Filing your taxes was never easier" > "free help" > "start now" OR "Search" "file taxes for free" > "Free internet filing options" > "Start now"

Success: Yes / No

Comments:

Please answer the following questions and statements **based on the task you just attempted.**

1. How easy or difficult was it to complete this task.

   ❑ Very   ❑ Difficult   ❑ Somewhat   ❑ Neutral   ❑ Somewhat   ❑ Easy   ❑ Very
   Difficult   Difficult   Easy   Easy

   Comments:

2. If I had to perform this task in real life, I would visit this site to perform it (as opposed to calling or some other method).

   ❑ Strongly   ❑ Disagree   ❑ Somewhat   ❑ Neutral   ❑ Somewhat   ❑ Agree   ❑ Strongly
   Disagree   Disagree   Agree   Agree

   Comments:

3. Was there anything you particularly liked (or disliked) about the way you were able to (or unable to) perform this task?

   What you liked: _____

   What you disliked: _____

Task Four:
You have money in a Roth IRA and are wondering if you are unsure if you have to report your nondeductbible contributions. Using the FAQ link where would you find the answer to your question?

Target: _____

Target = "More online tools" > "Frequently asked question" > "Keyword" < "R" < "Roth IRA" OR "Category" < "Individual retirement arrangements" < "Roth IRA"

Success: Yes / No

Comments:

_____

Please answer the following questions and statements **based on the task you just attempted.**

1. How easy or difficult was it to complete this task.

    ❑ Very   ❑ Difficult   ❑ Somewhat   ❑ Neutral   ❑ Somewhat   ❑ Easy   ❑ Very
       Difficult   Difficult   Easy   Easy
    Comments:

    _____

    _____

2. If I had to perform this task in real life, I would visit this site to perform it (as opposed to calling or some other method).

    ❑ Strongly   ❑ Disagree   ❑ Somewhat   ❑ Neutral   ❑ Somewhat   ❑ Agree   ❑ Strongly
       Disagree   Disagree   Agree   Agree
    Comments:

    _____

    _____

3. Was there anything you particularly liked (or disliked) about the way you were able to (or unable to) perform this task?

    What you liked: _____

    _____

    What you disliked: _____

    _____

Task Five:
You are a Canadian citizen both living and working in the United States. You are unsure if you need to file a US tax return or a Canadian tax return or both. Where would you go to find this information?

Target:

Target – "More online tools" – "Frequently asked questions" – "Keyword" < "Aliens and US Citizens living abroad"

Success: Yes / No

Comments:

_____

Please answer the following questions and statements **based on the task you just attempted.**

1. How easy or difficult was it to complete this task.

   ❏ Very   ❏ Difficult   ❏ Somewhat   ❏ Neutral   ❏ Somewhat   ❏ Easy   ❏ Very
   Difficult   Difficult   Easy   Easy

   Comments:
   _____
   _____

2. If I had to perform this task in real life, I would visit this site to perform it (as opposed to calling or some other method).

   ❏ Strongly   ❏ Disagree   ❏ Somewhat   ❏ Neutral   ❏ Somewhat   ❏ Agree   ❏ Strongly
   Disagree   Disagree   Agree   Agree

   Comments:
   _____
   _____

3. Was there anything you particularly liked (or disliked) about the way you were able to (or unable to) perform this task?

   What you liked: _____
   _____

   What you disliked: _____
   _____

Task Six:

You are a student who is at the IRS site because you have no idea where to look to find information about FAFSA. Using the IRS.gov FAQ's find the link to the FAFSA webite.

Target:

Targets "More online tools" < "Frequently Asked Questions" < "Keyword S" < "Student" < "Tax information for students" < "Free Application ... Federal Student Aid"

Success: Yes / No

Comments:

Please answer the following questions and statements **based on the task you just attempted.**

1. How easy or difficult was it to complete this task.

   ❑ Very   ❑ Difficult   ❑ Somewhat   ❑ Neutral   ❑ Somewhat   ❑ Easy   ❑ Very
      Difficult   Difficult   Easy   Easy

   Comments:

   _____

   _____

2. If I had to perform this task in real life, I would visit this site to perform it (as opposed to calling or some other method).

   ❑ Strongly   ❑Disagree   ❑Somewhat   ❑Neutral   ❑Somewhat   ❑ Agree   ❑ Strongly
      Disagree   Disagree   Agree   Agree

   Comments:

   _____

   _____

3. Was there anything you particularly liked (or disliked) about the way you were able to (or unable to) perform this task?

   What you liked: _____

   _____

   What you disliked: _____

   _____

Task Seven:
You are just about done with your son's taxes and realize you cannot finish them without finding out about what to do about his trust fund. You have already read through the FAQ's and found no answer your questions. Your last hope is to call the tax assistance line. How would you go about doing this?

Target: _____

Success: Yes / No

Comments:

_____

Please answer the following questions and statements **based on the task you just attempted.**

1. How easy or difficult was it to complete this task.

    ❏ Very   ❏ Difficult   ❏ Somewhat   ❏ Neutral   ❏ Somewhat   ❏ Easy   ❏ Very
    Difficult   Difficult   Easy   Easy

    Comments:

    _____

    _____

2. If I had to perform this task in real life, I would visit this site to perform it (as opposed to calling or some other method).

    ❏ Strongly   ❏ Disagree   ❏ Somewhat   ❏ Neutral   ❏ Somewhat   ❏ Agree   ❏ Strongly
    Disagree   Disagree   Agree   Agree

    Comments:

    _____

    _____

3. Was there anything you particularly liked (or disliked) about the way you were able to (or unable to) perform this task?

    What you liked: _____

    _____

    What you disliked: _____

    _____

Task Eight:
You get a notice in the mail from the IRS letting you know you are being investigated. You don't believe you have done anything wrong. You call the help line and they tell you to look on the website and find the organization within the IRS that helps taxpayers with problems such as these. Where on the IRS.gov website would you find this organization, what are they called, and who heads it?

Target:

Target   Contact IRS > "Taxpayer advocacy" > "Taxpayer advocate service"   Hic is a tax problem   need help?"

Success: Yes / No

Comments:

Please answer the following questions and statements **based on the task you just attempted.**

1. How easy or difficult was it to complete this task.

    ❑ Very   ❑ Difficult   ❑ Somewhat   ❑ Neutral   ❑ Somewhat   ❑ Easy   ❑ Very
    Difficult   Difficult   Easy   Easy
        Comments:

    _____

    _____

2. If I had to perform this task in real life, I would visit this site to perform it (as opposed to calling or some other method).

    ❑ Strongly   ❑ Disagree   ❑ Somewhat   ❑ Neutral   ❑ Somewhat   ❑ Agree   ❑ Strongly
    Disagree   Disagree   Agree   Agree
        Comments:

    _____

    _____

3. Was there anything you particularly liked (or disliked) about the way you were able to (or unable to) perform this task?

    What you liked: _____

    _____

    What you disliked: _____

    _____

Task Nine:
You have a babysitter, and once a week he/she cleans as part of her duties. He/She doesn't live with you and you are unsure if they are considered a household employee or not. Find your answer using search.

Target:

Target – "Hiring a babysitter" < IP Piccation #26 ('2 2005), Household employers tax guide" < "Do you have a household employee?"

Success: Yes / No

Comments:

_____

Please answer the following questions and statements **based on the task you just attempted.**

1. How easy or difficult was it to complete this task.

   □ Very   □ Difficult   □ Somewhat   □ Neutral   □ Somewhat   □ Easy   □ Very
   Difficult   Difficult   Easy   Easy

   Comments:
   _____   _____

2. If I had to perform this task in real life, I would visit this site to perform it (as opposed to calling or some other method).

   □ Strongly   □ Disagree   □ Somewhat   □ Neutral   □ Somewhat   □ Agree   □ Strongly
   Disagree   Disagree   Agree   Agree

   Comments:
   _____   _____

3. Was there anything you particularly liked (or disliked) about the way you were able to (or unable to) perform this task?

   What you liked: _____

   _____

   What you disliked: _____

   _____

Task Ten:
You are about to receive some assets because of a loss in your family. You need to fill out a form for tax purposes but are unsure of the form you need to fill out for taxes. Using search find the form number and the instructions for the form.

Target:

Target - Advanced Search's "Asset... ... ... s t o - Forms and Instructions" - Instruction 8594 (PDF) OR Form 8594"

Success: Yes / No

Comments:

Please answer the following questions and statements **based on the task you just attempted.**

1. How easy or difficult was it to complete this task.

    ❑ Very   ❑ Difficult   ❑ Somewhat   ❑ Neutral   ❑ Somewhat   ❑ Easy   ❑ Very
       Difficult   Difficult   Easy   Easy

       Comments:
       _____

       _____

2. If I had to perform this task in real life, I would visit this site to perform it (as opposed to calling or some other method).

    ❑ Strongly   ❑ Disagree   ❑ Somewhat   ❑ Neutral   ❑ Somewhat   ❑ Agree   ❑ Strongly
       Disagree   Disagree   Agree   Agree

       Comments:
       _____

       _____

3. Was there anything you particularly liked (or disliked) about the way you were able to (or unable to) perform this task?

       What you liked: _____

       _____

       What you disliked: _____

       _____

Task Eleven:
You are being brave, and this year, you have decided to do your own taxes. You wonder whether the IRS has some sort of instructions or guide that could help you out if you have any questions. Using search, find the information.

Target:
Target – "Search: tax guide" < IRS p... ...t... 1 Free Tax guide for ...ndividuals" < "Publication 17, your federal income tax"

Success: Yes / No

Comments:

Please answer the following questions and statements **based on the task you just attempted.**

1. How easy or difficult was it to complete this task.

   ❑ Very   ❑ Difficult   ❑ Somewhat   ❑ Neutral   ❑ Somewhat   ❑ Easy   ❑ Very
   Difficult   Difficult   Easy   Easy

   Comments:
   _____

   _____

2. If I had to perform this task in real life, I would visit this site to perform it (as opposed to calling or some other method).

   ❑ Strongly   ❑ Disagree   ❑ Somewhat   ❑ Neutral   ❑ Somewhat   ❑ Agree   ❑ Strongly
   Disagree   Disagree   Agree   Agree

   Comments:
   _____

   _____

3. Was there anything you particularly liked (or disliked) about the way you were able to (or unable to) perform this task?

   What you liked: _____

   _____

   What you disliked: _____

   _____

FINAL Task:

Review the list you created of the types of information that you personally might typically want to find on the IRS.gov Web site. Choose one item and locate it on the IRS.gov site.

Target:
N/A

Success: Yes / No

Comments:

Please answer the following questions and statements **based on the task you just attempted.**

1. How easy or difficult was it to complete this task.

   ❑ Very   ❑ Difficult   ❑ Somewhat   ❑ Neutral   ❑ Somewhat   ❑ Easy   ❑ Very
   Difficult   Difficult   Easy   Easy

   Comments:
   _____
   _____

2. If I had to perform this task in real life, I would visit this site to perform it (as opposed to calling or some other method).

   ❑ Strongly   ❑Disagree   ❑Somewhat   ❑Neutral   ❑Somewhat   ❑ Agree   ❑ Strongly
   Disagree   Disagree   Agree   Agree

   Comments:
   _____
   _____

3. Was there anything you particularly liked (or disliked) about the way you were able to (or unable to) perform this task?

   What you liked: _____
   _____

   What you disliked: _____
   _____

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Tax Professionals Participant Package

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  "No problem; it was obvious that clicking on the XYZ link would take me to this page which completes the task."

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- If you have trouble with a task:
    1. Tell us what is happening and why it's different than you expected.
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    3. Ask the administrator for help if you cannot proceed further.
       (However, try to think of the administrator as a friend you would have to call.)
    4. Let us know when you think you'd normally stop and just call the IRS instead or if you'd just try again another time.

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Remember that if at any point during the session you feel you need to end the session and leave, you are of course free to do so.

Do you have any questions before we start?

Participant's Name: _____   **Date:** _____

2. Types of Information You Typically Want to Find

Before we get started with the tasks, please list the types of information that you personally might typically want to find on the IRS.gov Web site, using a separate line for each item:

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4. Tasks

Now we will start the session. Please perform the tasks using the demo version of the site unless asked otherwise. *After performing a task*, please answer the questions below the task on the page.

Task One:
Your client is a resident of Tennessee and you need to know where to send his tax return to. You have completed the 1040EZ form and are enclosing a payment. What address would you send the form and payment to?

Target:

Target = "IRS E-File" < "Where to File" < "Where to file addresses for individual taxpayers by state" < "TN" OR "Skip to State Links" < "Tennessee" OR "TENNESSEE - Where to File Addresses for Individual Taxpayers 1040EZ"

Comments:

_____

Please answer the following questions and statements **based on the task you just attempted.**

1.   Please comment on your first impression of the website:

Comments:

_____   _____

_____   _____

_____   _____

_____   _____

2.   If this website had informed your first opinion, what might you think of the IRS?

Comments:

_____   _____

_____   _____

_____   _____

_____   _____

3.   Was there anything you particularly liked (or disliked) about your first impression?

What you liked: _____   _____

_____

What you disliked: _____   _____

_____

Task Two:
Recently you heard from a co-worker that you are now eligible to e-file your clients taxes. Using e-file how would you go about applying for this?

Target:

Target = 'Tax Professionals' < "e-services-Online tools for tax professionals" < "IRS e-file made easy – A tax professional's one stop e-file and e-pay shop" < "IRS e-file Application process. Step1 - How to apply"

Success: Yes / No

Comments:

Please answer the following questions and statements **based on the task you just attempted.**

1. How easy or difficult was it to complete this task.

   ❑ Very Difficult ❑ Difficult ❑ Somewhat Difficult ❑ Neutral ❑ Somewhat Easy ❑ Easy ❑ Very Easy

   Comments:
   _____
   _____

2. If I had to perform this task in real life, I would visit this site to perform it (as opposed to calling or some other method).

   ❑ Strongly Disagree ❑ Disagree ❑ Somewhat Disagree ❑ Neutral ❑ Somewhat Agree ❑ Agree ❑ Strongly Agree

   Comments:
   _____
   _____

3. Was there anything you particularly liked (or disliked) about the way you were able to (or unable to) perform this task?

   What you liked: _____
   _____

   What you disliked: _____
   _____

Task Three:
You have already flied a return for your client and you now have to go before the IRS and represent your client. You schedule is busy so you would rather do all of it online. You are aware of the Electronic Account Resolution, but are not sure if this is exactly what you need. Find this resolution online, and is it necessary for one to be a participant of the e-file program?

Target:

Target – "Tax Professionals" < "Basic Tools for tax pro" < "E-Services Electronic Account Resolution" < Scroll down to Electronic Account Resolution.

Success: Yes / No

Comments:

Please answer the following questions and statements **based on the task you just attempted.**

1. How easy or difficult was it to complete this task.

   ❑ Very   ❑ Difficult   ❑ Somewhat   ❑ Neutral   ❑ Somewhat   ❑ Easy   ❑ Very
   Difficult   Difficult   Easy   Easy
   Comments:

   _____

   _____

2. If I had to perform this task in real life, I would visit this site to perform it (as opposed to calling or some other method).

   ❑ Strongly   ❑Disagree   ❑Somewhat   ❑Neutral   ❑Somewhat   ❑ Agree   ❑ Strongly
   Disagree   Disagree   Agree   Agree
   Comments:

   _____

   _____

3. Was there anything you particularly liked (or disliked) about the way you were able to (or unable to) perform this task?

   What you liked: _____

   _____

   What you disliked: _____

   _____

Task Four:
Your client has money in a Roth IRA and you are unsure if you have to report their nondeductbible contributions. Using the FAQ link where would you find the answer to your question?

Target:

Target = More online tools > "Frequently asked questions" > Keyword "R" > Roth IRA" OR "Category > Individual retirement arrangements" > Roth IRA

Success: Yes / No

Comments:

Please answer the following questions and statements **based on the task you just attempted.**

1. How easy or difficult was it to complete this task.

   ❑ Very Difficult ❑ Difficult ❑ Somewhat Difficult ❑ Neutral ❑ Somewhat Easy ❑ Easy ❑ Very Easy

   Comments:

2. If I had to perform this task in real life, I would visit this site to perform it (as opposed to calling or some other method).

   ❑ Strongly Disagree ❑ Disagree ❑ Somewhat Disagree ❑ Neutral ❑ Somewhat Agree ❑ Agree ❑ Strongly Agree

   Comments:

3. Was there anything you particularly liked (or disliked) about the way you were able to (or unable to) perform this task?

   What you liked:

   What you disliked:

Task Four:
Your client has money in a Roth IRA and you are unsure if you have to report their nondeductbible contributions. Using the FAQ link where would you find the answer to your question?

Target:

Target -> "More on the tools" -> "Frequently asked questions" -> "Keyword" -> "R" -> Roth IRA` OR "Category" -> "Individual retirement arrangements" -> Roth IRA

Success: Yes / No

Comments:

_____

Please answer the following questions and statements **based on the task you just attempted.**

1. How easy or difficult was it to complete this task.

   ❑ Very   ❑ Difficult   ❑ Somewhat   ❑ Neutral   ❑ Somewhat   ❑ Easy   ❑ Very
     Difficult   Difficult   Easy   Easy
   Comments:

   _____

   _____

2. If I had to perform this task in real life, I would visit this site to perform it (as opposed to calling or some other method).

   ❑ Strongly   ❑ Disagree   ❑ Somewhat   ❑ Neutral   ❑ Somewhat   ❑ Agree   ❑ Strongly
     Disagree   Disagree   Agree   Agree
   Comments:

   _____

   _____

3. Was there anything you particularly liked (or disliked) about the way you were able to (or unable to) perform this task?

   What you liked: _____

   _____

   What you disliked: _____

   _____

Task Five:
Your client is a Canadian citizen both living and working in the United States. You are unsure if you need to file a US tax return or a Canadian tax return or both. Where would you go to find this information?

Target:

Target: "More online tools" < "Frequently asked questions" < "Keyword" < "Aliens and US Citizens living abroad"

Success: Yes / No

Comments:

Please answer the following questions and statements **based on the task you just attempted.**

1. How easy or difficult was it to complete this task.

   ❑ Very   ❑ Difficult   ❑ Somewhat   ❑ Neutral   ❑ Somewhat   ❑ Easy   ❑ Very
   Difficult   Difficult   Easy   Easy

   Comments: _____

   _____

2. If I had to perform this task in real life, I would visit this site to perform it (as opposed to calling or some other method).

   ❑ Strongly   ❑ Disagree   ❑ Somewhat   ❑ Neutral   ❑ Somewhat   ❑ Agree   ❑ Strongly
   Disagree   Disagree   Agree   Agree

   Comments: _____

   _____

3. Was there anything you particularly liked (or disliked) about the way you were able to (or unable to) perform this task?

   What you liked: _____

   _____

   What you disliked: _____

   _____

Task Six:
A client you did taxes for last year calls you and states that he/she feels that someone may have filed a return using their social security number because the IRS is calling and wants to know why 2 returns were filed with the same SSN. You want to help your worried client, but aren't 100% sure one what exactly to do. Using the FAQ find the answer so that you can help your client.

Target:

Target = 'More online tools' < "Frequently asked questions" < FAQ by category < "Reporting Fraud"

Success: Yes / No

Comments:

Please answer the following questions and statements **based on the task you just attempted.**

1. How easy or difficult was it to complete this task.

    ❑ Very   ❑ Difficult   ❑ Somewhat   ❑ Neutral   ❑ Somewhat   ❑ Easy   ❑ Very
    Difficult   Difficult   Easy   Easy

    Comments:

    _____

    _____

2. If I had to perform this task in real life, I would visit this site to perform it (as opposed to calling or some other method).

    ❑ Strongly   ❑ Disagree   ❑ Somewhat   ❑ Neutral   ❑ Somewhat   ❑ Agree   ❑ Strongly
    Disagree   Disagree   Agree   Agree

    Comments: .

    _____

    _____

3. Was there anything you particularly liked (or disliked) about the way you were able to (or unable to) perform this task?

    What you liked: _____

    _____

    What you disliked: _____

    _____

Task Seven:

Your client's taxes are just about completed and you realize you cannot finish them without finding out about what to do about his trust fund. You have already read through the FAQ's and found no answer your questions. Your last hope is to call the tax assistance line. How would you go about doing this?

Target:

Target = "Contact IRS" < "Contact the IRS.gov Help Desk"< "Help with tax questions

Success: Yes / No

Comments:

Please answer the following questions and statements **based on the task you just attempted.**

1. How easy or difficult was it to complete this task.

   ❑ Very   ❑ Difficult   ❑ Somewhat   ❑ Neutral   ❑ Somewhat   ❑ Easy   ❑ Very
   Difficult   Difficult   Easy   Easy

   Comments:

   _____

   _____

2. If I had to perform this task in real life, I would visit this site to perform it (as opposed to calling or some other method).

   ❑ Strongly   ❑ Disagree   ❑ Somewhat   ❑ Neutral   ❑ Somewhat   ❑ Agree   ❑ Strongly
   Disagree   Disagree   Agree   Agree

   Comments:

   _____

   _____

3. Was there anything you particularly liked (or disliked) about the way you were able to (or unable to) perform this task?

   What you liked: _____

   _____

   What you disliked: _____

   _____

Task Eight:
Your client has a babysitter, and once a week he/she cleans as part of her duties. He/She doesn't live with you and you are unsure if they are considered a household employee or not. Find your answer using search.

Target:
Target – "Search babysitter < Publication 926 (12/2005), Household employers tax guide" < Do you have a household employee?"

Success: Yes / No

Comments:

Please answer the following questions and statements **based on the task you just attempted.**

1. How easy or difficult was it to complete this task.

   ❏ Very Difficult   ❏ Difficult   ❏ Somewhat Difficult   ❏ Neutral   ❏ Somewhat Easy   ❏ Easy   ❏ Very Easy

   Comments:
   _____
   _____

2. If I had to perform this task in real life, I would visit this site to perform it (as opposed to calling or some other method).

   ❏ Strongly Disagree   ❏ Disagree   ❏ Somewhat Disagree   ❏ Neutral   ❏ Somewhat Agree   ❏ Agree   ❏ Strongly Agree

   Comments:
   _____
   _____

3. Was there anything you particularly liked (or disliked) about the way you were able to (or unable to) perform this task?

   What you liked: _____
   _____

   What you disliked: _____
   _____

Task Nine:
Your client is about to receive some assets because of a loss in their family. You need to fill out a form for tax purposes but are unsure of the form you need to fill out for taxes. Using search find the form number and the instructions for the form.

Target:

Target – 'Advanced Search → Assets acquisition, Forms and instructions' < "Instruction 8594 (PDF) OR Form 8594"

Success: Yes / No

Comments:

Please answer the following questions and statements **based on the task you just attempted.**

1. How easy or difficult was it to complete this task.

   ❏ Very   ❏ Difficult   ❏ Somewhat   ❏ Neutral   ❏ Somewhat   ❏ Easy   ❏ Very
   Difficult   Difficult   Easy   Easy

   Comments:
   _____   _____

   _____   _____

2. If I had to perform this task in real life, I would visit this site to perform it (as opposed to calling or some other method).

   ❏ Strongly   ❏ Disagree   ❏ Somewhat   ❏ Neutral   ❏ Somewhat   ❏ Agree   ❏ Strongly
   Disagree   Disagree   Agree   Agree

   Comments:
   _____   _____

   _____   _____

3. Was there anything you particularly liked (or disliked) about the way you were able to (or unable to) perform this task?

   What you liked: _____

   _____

   What you disliked: _____

   _____   _____

Task Ten:

Your client comes to you and believes they're eligible for earned income tax credit for the year 2005. Using search find out how you can help your client figure out if they are eligible for EITC.

Target:

Success: Yes / No

Comments:

Please answer the following questions and statements **based on the task you just attempted.**

1. How easy or difficult was it to complete this task.

   ❑ Very   ❑ Difficult   ❑ Somewhat   ❑ Neutral   ❑ Somewhat   ❑ Easy   ❑ Very
   Difficult   Difficult   Easy   Easy

   Comments:

2. If I had to perform this task in real life, I would visit this site to perform it (as opposed to calling or some other method).

   ❑ Strongly   ❑ Disagree   ❑ Somewhat   ❑ Neutral   ❑ Somewhat   ❑ Agree   ❑ Strongly
   Disagree   Disagree   Agree   Agree

   Comments:

3. Was there anything you particularly liked (or disliked) about the way you were able to (or unable to) perform this task?

   What you liked: _____

   _____

   What you disliked: _____

   _____

FINAL Task:

Review the list you created of the types of information that you personally might typically want to find on the IRS.gov Web site. Choose one item and locate it on the IRS.gov site.

Target:
N/A

Success: Yes / No

Comments:

Please answer the following questions and statements **based on the task you just attempted.**

1. How easy or difficult was it to complete this task.

   ❑ Very   ❑ Difficult   ❑ Somewhat   ❑ Neutral   ❑ Somewhat   ❑ Easy   ❑ Very
   Difficult   Difficult   Easy   Easy

   Comments:
   _____

   _____

2. If I had to perform this task in real life, I would visit this site to perform it (as opposed to calling or some other method).

   ❑ Strongly   ❑ Disagree   ❑ Somewhat   ❑ Neutral   ❑ Somewhat   ❑ Agree   ❑ Strongly
   Disagree   Disagree   Agree   Agree

   Comments:
   _____

   _____

3. Was there anything you particularly liked (or disliked) about the way you were able to (or unable to) perform this task?

   What you liked: _____

   _____

   What you disliked: _____

   _____

IRS.gov 2006 Nationwide Tax Forum (NTF) Usability Study

Business Participant Package

MODERATOR GUIDE

1. Introduction

Today you will be evaluating a proposed redesign of IRS.gov. We appreciate you taking time out of your day to help us improve the quality and usefulness of this application.

During the evaluation, you will be asked to perform a few typical tasks. Use the site as you might—or do—use it at home or at work and let us know what you are thinking as you go along. Your feedback during this test session is vital: It will help shape the future application. Please comment freely on anything you observe. Both positive and negative comments are welcome!

This session will be videotaped using microphones, a video camera, and a device to videotape the computer screen. Additionally, another person will be taking notes behind the mirror. These recordings will only be used for purposes of data analysis.

Please note that the Paperwork Reduction Act requires that the IRS display an OMB control number on all public information requests. The OMB Control Number for this study is #1545-1349. Also, if you have any comments regarding the time estimates associated with this study or suggestions on making this process simpler, please write to:

Internal Revenue Service
Tax Products Coordinating Committee
SE:W:CAR:MP:T:T:SP
1111 Constitution Ave. NW
Washington, DC 20224

Important Guidelines:

While you are completing the tasks:

- Think out loud. Tell us what's going on while you are attempting a task. For example:

  "I'm having trouble doing this task because I cannot figure out where to go to do it. I thought I'd find a link to XYZ on the home page, but it doesn't seem to be there..."

  "No problem; it was obvious that clicking on the XYZ link would take me to this page which completes the task."

There is also space in this package for you to add additional written comments.

- If you have trouble with a task:
    1. Tell us what is happening and why it's different than you expected.
    2. Tell us what you did to try to overcome the problem.
    3. Ask the administrator for help if you cannot proceed further.
        (However, try to think of the administrator as a friend you would have to call.)
    4. Let us know when you think you'd normally stop and just call the IRS instead or if you'd just try again another time.

- Work at your own pace. Remember that we're evaluating the Web site – we're not evaluating you. If you have trouble, it probably means there is something we need to improve in the design.

- The facilitator may from time to time ask questions about what you're doing or thinking, or remind you to think out loud.

Remember that if at any point during the session you feel you need to end the session and leave, you are of course free to do so.

Do you have any questions before we start?

Internal Revenue Service
United States Department of the Treasury

Participant's Name: _____ _____   **Date:** _____ _____

2. Types of Information You Typically Want to Find

Before we get started with the tasks, please list the types of information that you personally might typically want to find on the IRS.gov Web site, using a separate line for each item:

_____

_____

_____

_____

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Internal Revenue Service
United States Department of the Treasury

4. Tasks

Now we will start the session. Please perform the tasks using the demo version of the site unless asked otherwise. *After performing a task*, please answer the questions below the task on the page.

Task One:
You are a large corporation and want to know if you are eligible to e-file. How would you find this information?

Target:

Target = "Business" < "e-file for large and mid sized Corporations"

Comments:

_____

Please answer the following questions and statements **based on the task you just attempted.**

1. Please comment on your first impression of the website:

   Comments:

   _____
   _____
   _____
   _____

2. If this website had informed your first opinion, what might you think of the IRS?

   Comments:

   _____
   _____
   _____
   _____

3. Was there anything you particularly liked (or disliked) about your first impression?

   What you liked: _____

   _____

   What you disliked: _____

   _____

Internal Revenue Service
United States Department of the Treasury

Task Two:
Being a business is it possible, and if so, how do you go about applying for e-services'?

Target:

T..... Business'... e-services P....

Success: Yes / No

Comments:

Please answer the following questions and statements **based on the task you just attempted.**

1. How easy or difficult was it to complete this task.

☐ Very   ☐ Difficult   ☐ Somewhat   ☐ Neutral   ☐ Somewhat   ☐ Easy   ☐ Very
Difficult   Difficult   Easy   Easy

   Comments: _____

   _____

2. If I had to perform this task in real life, I would visit this site to perform it (as opposed to calling or some other method).

☐ Strongly   ☐ Disagree   ☐ Somewhat   ☐ Neutral   ☐ Somewhat   ☐ Agree   ☐ Strongly
Disagree   Disagree   Agree   Agree

   Comments: _____

   _____

3. Was there anything you particularly liked (or disliked) about the way you were able to (or unable to) perform this task?

   What you liked: _____

   _____

   What you disliked: _____

   _____

Internal Revenue Service
United States Department of the Treasury

Task Three:
You have already filed a return for your business and you now have to go before the IRS and represent your business. You schedule is busy so you would rather do all of it online. You are aware of the Electronic Account Resolution, but are not sure if this is exactly what you need. Find this resolution online, and is it necessary for one to be a participant of the e-file program?

Target:
Target   'Tax Professionals' < 'Basic Tools for tax pro' < 'E-Services Electronic Account Resolution' < 'Goto Comm to Electronic Account Resolution'

Success: Yes / No

Comments:

Please answer the following questions and statements **based on the task you just attempted.**

1. How easy or difficult was it to complete this task.

    ☐ Very   ☐ Difficult   ☐ Somewhat   ☐ Neutral   ☐ Somewhat   ☐ Easy   ☐ Very
       Difficult   Difficult   Easy   Easy

    Comments:

    _____   _____

    _____   _____

2. If I had to perform this task in real life, I would visit this site to perform it (as opposed to calling or some other method).

    ☐ Strongly   ☐ Disagree   ☐ Somewhat   ☐ Neutral   ☐ Somewhat   ☐ Agree   ☐ Strongly
       Disagree   Disagree   Agree   Agree

    Comments:

    _____   _____

    _____   _____

3. Was there anything you particularly liked (or disliked) about the way you were able to (or unable to) perform this task?

    What you liked: _____

    _____

    What you disliked: _____

    _____

🏛 Internal Revenue Service
United States Department of the Treasury

Task Four:
You believe that being a mechanic and doing side jobs constitutes a 'small business', but you are unsure. You don't want to get into any "hot water" with the government so to be on the safe side you have decided to research on IRS.gov and find out if what you do would be considered a small business. Using the FAQ's find what the difference is in a small business and what might be a hobby.

Target:

Target - More online resources" < "FAQ by subcategory < Income and expences"

Success: Yes / No

Comments:

Please answer the following questions and statements **based on the task you just attempted.**

1. How easy or difficult was it to complete this task.

   ❑ Very   ❑ Difficult   ❑ Somewhat   ❑ Neutral   ❑ Somewhat   ❑ Easy   ❑ Very
   Difficult   Difficult   Easy   Easy

   Comments:
   _____

   _____

2. If I had to perform this task in real life, I would visit this site to perform it (as opposed to calling or some other method).

   ❑ Strongly   ❑ Disagree   ❑ Somewhat   ❑ Neutral   ❑ Somewhat   ❑ Agree   ❑ Strongly
   Disagree   Disagree   Agree   Agree

   Comments:
   _____

   _____

3. Was there anything you particularly liked (or disliked) about the way you were able to (or unable to) perform this task?

   What you liked: _____

   _____

   What you disliked: _____

   _____

₪ Internal Revenue Service
United States Department of the Treasury

Task Five:
You have just created your new business and have 5 employees. You are aware of a tax ID number, but are unsure if you need one for your small business. Where would you find this topic using the IRS.gov FAQ's?

Target:

Target = 'Small Business/Self-Employed Other Business ... SS-4 & Employer Identification Number (EIN)'

Success: Yes / No

Comments:

Please answer the following questions and statements **based on the task you just attempted.**

1. How easy or difficult was it to complete this task.

   ❑ Very   ❑ Difficult   ❑ Somewhat   ❑ Neutral   ❑ Somewhat   ❑ Easy   ❑ Very
   Difficult   Difficult   Easy   Easy

   Comments:

   _____

   _____

2. If I had to perform this task in real life, I would visit this site to perform it (as opposed to calling or some other method).

   ❑ Strongly   ❑ Disagree   ❑ Somewhat   ❑ Neutral   ❑ Somewhat   ❑ Agree   ❑ Strongly
   Disagree   Disagree   Agree   Agree

   Comments:

   _____

   _____

3. Was there anything you particularly liked (or disliked) about the way you were able to (or unable to) perform this task?

   What you liked: _____

   _____

   What you disliked: _____

   _____

Internal Revenue Service
United States Department of the Treasury

Task Six:
Your business is a partnership and you have questions about estimated tax and how your business files and pays quarterly tax payments. Using the FAQ's where would you look to find the answer to your question?

Target:

Target - 'Business' < Business Topics .More Topics < "Procedures, regs, rulings, FAQs" < 'FAQ's by subcategory' < Estimated Tax Business

Success: Yes / No

Comments:

Please answer the following questions and statements **based on the task you just attempted.**

1. How easy or difficult was it to complete this task.

   ❑ Very Difficult   ❑ Difficult   ❑ Somewhat Difficult   ❑ Neutral   ❑ Somewhat Easy   ❑ Easy   ❑ Very Easy

   Comments: _____

   _____

2. If I had to perform this task in real life, I would visit this site to perform it (as opposed to calling or some other method).

   ❑ Strongly Disagree   ❑ Disagree   ❑ Somewhat Disagree   ❑ Neutral   ❑ Somewhat Agree   ❑ Agree   ❑ Strongly Agree

   Comments: _____

   _____

3. Was there anything you particularly liked (or disliked) about the way you were able to (or unable to) perform this task?

   What you liked: _____

   _____

   What you disliked: _____

   _____

Internal Revenue Service
United States Department of the Treasury

Task Seven:
Your company is international and you have no idea where to begin when doing taxes. You have looked on the site (FAQ's, Search, Business) and still, you are confused. Where could you find another source of help on the IRS.gov site?

Target:

Target = "Contact IRS" for Help with Tax Questions"

Success: Yes / No

Comments:

Please answer the following questions and statements **based on the task you just attempted.**

1. How easy or difficult was it to complete this task.

   ❑ Very   ❑ Difficult   ❑ Somewhat   ❑ Neutral   ❑ Somewhat   ❑ Easy   ❑ Very
   Difficult   Difficult   Easy   Easy

   Comments:

   _____

   _____

2. If I had to perform this task in real life, I would visit this site to perform it (as opposed to calling or some other method).

   ❑ Strongly   ❑ Disagree   ❑ Somewhat   ❑ Neutral   ❑ Somewhat   ❑ Agree   ❑ Strongly
   Disagree   Disagree   Agree   Agree

   Comments:

   _____

   _____

3. Was there anything you particularly liked (or disliked) about the way you were able to (or unable to) perform this task?

   What you liked: _____

   _____

   What you disliked: _____

   _____

Internal Revenue Service
United States Department of the Treasury

Task Eight:
Your company is about to receive some assets because of a recent merger. You need to fill out a form for tax purposes but are unsure of the form you need to fill out for taxes. Using search find the form number and the instructions for the form.

Target:

Target: "Advanced Search → "Assets acquisition, Form and Instructions" < "Instruction 8594 (PDF) OR Form 8594

Success: Yes / No

Comments:

Please answer the following questions and statements **based on the task you just attempted.**

1. How easy or difficult was it to complete this task.

   ❑ Very   ❑ Difficult   ❑ Somewhat   ❑ Neutral   ❑ Somewhat   ❑ Easy   ❑ Very
   Difficult   Difficult   Easy   Easy

   Comments:
   _____
   _____

2. If I had to perform this task in real life, I would visit this site to perform it (as opposed to calling or some other method).

   ❑ Strongly   ❑ Disagree   ❑ Somewhat   ❑ Neutral   ❑ Somewhat   ❑ Agree   ❑ Strongly
   Disagree   Disagree   Agree   Agree

   Comments:
   _____
   _____

3. Was there anything you particularly liked (or disliked) about the way you were able to (or unable to) perform this task?

   What you liked: _____

   _____

   What you disliked: _____

   _____

Internal Revenue Service
United States Department of the Treasury

Task Nine:

Unfortunately your company is now bankrupt and you still have to pay taxes. Using Search find the form that needs to be completed in order to get a reduction of tax attributes.

Target:

Target – "Search "Bankruptcy Form" < Form 982 (PDF)

Success: Yes / No

Comments:

Please answer the following questions and statements **based on the task you just attempted.**

1. How easy or difficult was it to complete this task.

   ❑ Very Difficult ❑ Difficult ❑ Somewhat Difficult ❑ Neutral ❑ Somewhat Easy ❑ Easy ❑ Very Easy

   Comments:

2. If I had to perform this task in real life, I would visit this site to perform it (as opposed to calling or some other method).

   ❑ Strongly Disagree ❑ Disagree ❑ Somewhat Disagree ❑ Neutral ❑ Somewhat Agree ❑ Agree ❑ Strongly Agree

   Comments:

3. Was there anything you particularly liked (or disliked) about the way you were able to (or unable to) perform this task?

   What you liked:

   What you disliked:

Internal Revenue Service
United States Department of the Treasury

Task Ten:
You are getting older and is it time to retire and you have no desire to sell your business. Instead you decide to just close your business but you don't know what to do about your income and expenses. Using search, find out what you would do.

Target:

Target   Search "Closing a business" < "Closing a Business-Income and Expences"

Success: Yes / No

Comments:

Please answer the following questions and statements **based on the task you just attempted.**

1. How easy or difficult was it to complete this task.

   □ Very Difficult   □ Difficult   □ Somewhat Difficult   □ Neutral   □ Somewhat Easy   □ Easy   □ Very Easy

   Comments:

   _____

   _____

2. If I had to perform this task in real life, I would visit this site to perform it (as opposed to calling or some other method).

   □ Strongly Disagree   □ Disagree   □ Somewhat Disagree   □ Neutral   □ Somewhat Agree   □ Agree   □ Strongly Agree

   Comments:

   _____

   _____

3. Was there anything you particularly liked (or disliked) about the way you were able to (or unable to) perform this task?

   What you liked: _____

   _____

   What you disliked: _____

   _____

Internal Revenue Service
United States Department of the Treasury

FINAL Task:

Review the list you created of the types of information that you personally might typically want to find on the IRS.gov Web site. Choose one item and locate it on the IRS.gov site.

Target:
N/A

Success: Yes / No

Comments:

Please answer the following questions and statements **based on the task you just attempted.**

1. How easy or difficult was it to complete this task.

   ❏ Very Difficult   ❏ Difficult   ❏ Somewhat Difficult   ❏ Neutral   ❏ Somewhat Easy   ❏ Easy   ❏ Very Easy

   Comments:
   _____
   _____

2. If I had to perform this task in real life, I would visit this site to perform it (as opposed to calling or some other method).

   ❏ Strongly Disagree   ❏ Disagree   ❏ Somewhat Disagree   ❏ Neutral   ❏ Somewhat Agree   ❏ Agree   ❏ Strongly Agree

   Comments:
   _____
   _____

3. Was there anything you particularly liked (or disliked) about the way you were able to (or unable to) perform this task?

   What you liked: _____
   _____

   What you disliked: _____
   _____

Internal Revenue Service
United States Department of the Treasury

7. Exit Questionnaire

Instructions:
Please circle the single response that best matches your answer where there is a multiple choice question and print your response in the space provided for open ended questions. Please feel free to include your feedback in the comments areas provided.

Please answer the following questions and statements **based on all the tasks you performed today**.

Navigating the Demo

1. **How easy was it to find your way through the site using the navigation bar at the top?**

Very Hard	Hard	Slightly Hard	Slightly Easy	Easy	Very Easy

   Comments:

2. **Did the words on the navigation bar make sense to you? What would you have preferred to see on the navigation bar?**

   Yes   No

   Comments:

3. **Did you have difficulty completing tasks?**

   Yes   No

   Comments:

4. **If you lost your way, how easy was it to recover and continue searching for the answer to your task?**

Very Hard	Hard	Slightly Hard	Slightly Easy	Easy	Very Easy

   Comments:

Internal Revenue Service
United States Department of the Treasury

5. **Many users come to the IRS.gov website looking for tax forms. How easy was it to find forms on the site? How might the path to forms be made more intuitive?**

Very Hard	Hard	Slightly Hard	Slightly Easy	Easy	Very Easy

Comments:

Site Features

6. **Please list the 2 most helpful features of this website.**

7. **Please list the 2 least helpful features of this website.**

8. **If you used the "I need to..." dropdown, what was your opinion of this tool? Was it useful?**

Not Useful at All	Not Useful	Slightly Unuseful	Slightly Useful	Useful	Very Useful

Comments:

9. **If you used the links in the upper right-hand corner of the pages (About IRS, Help, etc.) how useful were they? Did you like their location?**

Not Useful at All	Not Useful	Slightly Unuseful	Slightly Useful	Useful	Very Useful

Comments:

Internal Revenue Service
United States Department of the Treasury

Search Feature

10. How would you rate the difficulty of initially finding the search box on the page?

Very Hard	Hard	Slightly Hard	Slightly Easy	Easy	Very Easy

Comments:

11. Did you understand the purpose of the search term field and the drop-down field beside it?

Yes   No

Comments:

Site Aesthetics

12. To what degree did you find the homepage visually attractive?

Not Attractive At All	Not Attractive	Slightly Unattractive	Slightly Attractive	Attractive	Very Attractive

Comments:

13. How would you rate the amount of information on each page of the IRS.gov website?

Far Too Much Information— Overload	Too Much Information	About the Correct Amount per Page	Too Little Information	Far Too Little Information— Unsatisfied

Comments:

14. Did you find the colors used throughout the website attractive?

Yes   No

Comments:

Internal Revenue Service
United States Department of the Treasury

15. Did you find that the site maintained a good balance of text versus graphics?

Yes   No

Comments:

Other Features

16. Please list any features you expected on this website but did not find.

17. What other improvements would make it easier to find and read content on IRS.gov?

18. Do you have overall suggestions for improvement of the website?

Internal Revenue Service
United States Department of the Treasury

8. Confirmation Phone Call Script

Good morning/afternoon, I am calling to confirm your participation in our upcoming research usability study for the Internal Revenue Service about the IRS.gov Web site.

Reference the OMB Control Number and PRA Statement as noted below before continuing with the interview:

The Paperwork Reduction Act requires that the IRS display an OMB control number on all public information requests. The OMB Control Number for this study is #1545-1349. Also, if you have any comments regarding the time estimates associated with this study or suggestions on making this process simpler, please write to:

Internal Revenue Service
Tax Products Coordinating Committee
SE:W:CAR:MP:T:T:SP
1111 Constitution Ave. NW
Washington, DC 20224

Did you receive a package from us with the date and time of your interview and directions to the site?

Yes .... ☐   **Confirm Date and Time are OK and that Directions are clear (see below). Verify that they have transportation to get to the facility.**

No .... ☐   **Detail the appointment [See below] and ask if they have FAX # or email address that you can send the information to.**

DATE:	**(insert date)**
TIME:	(insert time)
LOCATION:	**IRS 2005 Tax Forum City ?**
DIRECTIONS:	*Provide 2006 Tax Forum City and Hotel Location*
	Contact Liz Baker at 202-283-7847 if you get lost.
	See enclosure
LENGTH:	**3 hours (including travel time and 60 minute interview)**

Internal Revenue Service
United States Department of the Treasury

Please check in 15 minutes before the session start time to ensure that we proceed on schedule. Please bring your photo ID upon check-in. If you use reading glasses, please bring these with you.

We have invited only a limited number of people, and we are counting on your timely attendance and participation for completion of our study. There is no back up person to participate if you do not show up to the research study, so it is very important that you keep your commitment. Should something change in your participation availability, please phone our call center at 1-888-xxx-xxxx and reference "IRS.gov Nationwide Usability Study".

All of our interviews are conducted strictly for research. At no time will someone attempt to sell you any product or service, nor will your name be supplied to any manufacturer for sales purposes. Your honorarium of $75 will be paid at the end of your interview.

Do you have any questions?

[ANSWER INQUIRIES APPROPRIATELY AND THOROUGHLY]

Again, thank you for your time and we look forward to seeing you on [**day of week**] at [**time**].