Appendix B: Screener Guide for the Card Sorting Test Exercise

Hello, my name is _____ and I am an employee of the Internal Revenue Service. I am recruiting approximately 15 tax practitioners to participate in an exercise that will help us to improve a section of our IRS.gov website. Management at the IRS feels that the website users are the best people to ask for input as we redesign a section of the website.

First, may I ask you a qualifying question?

Question #1: Are you familiar with the FOIA (Freedom of Information Act) web pages on the IRS.gov website?

If the answer is yes, then invite the practitioner to participate in the exercise.
If the answer is no, ask question #2.

Question #2: Have you ever researched a tax related issue on the IRS.gov website?

If the answer is yes, then invite the practitioner to participate in the exercise.
If the answer is no, thank the practitioner for stopping to talk with you.

We would like to invite you to participate in a website exercise. We want to hear your opinions, views and ideas on how we can improve a section of the IRS.gov website to serve you better. The session should take less than one hour and will be held on __(day)__ at __(time) __ in Room _____.

The Paperwork Reduction Act requires that the IRS display an OMB control number on all public information requests. The OMB Control Number for this test exercise is 1545-1349. We estimate the time required to less than one hour. 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
1111Constitution Ave. NW
Washington, DC 20224

Appendix C: Participant Instructions for the Card Sorting Test Exercise

To prepare, shuffle the deck so the cards are in a random order. Meet with the participant at a large table with plenty of room to spread the cards out.

Read to the participant:

The purpose of the Freedom of Information Act was to promote openness in government and to make documents related to the workings of government available to any interested party. The FOIA web page and the Electronic Reading Room were established to make information about the IRS even easier to access. We try to ensure that any general information that can be released under FOIA is posted to the site for anyone to read. We did some testing on these web pages and found out that, while the information was there, it wasn't always easy to find. We are conducting a card sorting exercise that will allow us to see how you would organize the information so that it is structured in a way that makes sense to you.

The purpose of this test is to help us understand how our web site users interpret the types on information on the FOIA web page and in the Electronic Reading Room. The cards represent some names of topics you will currently find on these pages as well as some topics that we anticipate using in the future.

What I would like you to do is to take these cards place them into groups that you feel represent categories that make sense to you. You may make as many or as few categories as you like. There is no right or wrong answer; what is important to the IRS is learning how to group these documents in way that makes sense to you.

Once you have the cards sorted and grouped in a way that you feel makes sense, you can take one of the blank cards and write a name for a category on it. Choose a name that you think best describes each stack/group of your cards . The names can be as long or short as you like, we just want to get a sense of why you consider those links to be a group - the name doesn't have to be perfect.

This exercise should not take anymore than 1 hour. I will let you work on your own, but feel free to see me if you have any questions.

Potential questions they may have:

1. What if I don't understand the topic name?

I would be happy to explain in different terms, and if you still aren't familiar enough then you can create a separate pile of those that have no meaning to you.

2. May I put cards in more than one category?

Yes, you can. I will provide you with a pen and some blank cards that you can use to duplicate topics. It would help if you would also note which other category you put the topic into.

4. What if some of the links don't seem to fit into any category?

Feel free to make a category called "other" or "general".

When finished:

When they are done, put a rubber band around each labeled group of cards and then a rubber band around the whole set of cards.