Attachment 1: Telephone/ Participant Screeners Questionnaire

IRS.gov Redesign Usability Study
Individuals Screener
Job

First Name:		**Date**	
Last Name:			
Male / Female (NOTE AT BEGINNING OF INTERVIEW):			
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 DOT GOV? What we would like to do is ask you a few questions to see if you would be able to participate in a 90 minute evaluation of an IRS web site to be scheduled during the week of December 6th. The IRS is interested in finding out your opinions on the way they have designed their site. These evaluations are for research purposes only – we just want your opinions. We also want you to know the IRS will NOT in anyway use your personal information for anything other than the strict usage of it for this particular study. We would pay you to come to the IRS testing facility 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 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 #Insert Control Number. 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

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

1. 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 Q4**

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

3. 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
__	For a city, state or federal government agency? If so, which one?

IF YES TO ANY TERMINATE

IF IRS, TERMINATE

4. Do you have access to the internet where you can use it for your own personal use?
YES
NO TERMINATE

5. On a scale of 1 to 5 where 1 means 'not at all comfortable' and 5 means 'very comfortable', how comfortable are you with… **TERMINATE 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**
using a scroll bar	1	2	**3**	**4**	**5**

6. Have you currently or in the past personally prepared an income tax return for yourself or your family, or have you always used an outside agency?
Personally prepare the taxes………………..Continue
Uses an outside agency……………………..Terminate

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? **IF NOT EMPLOYED SKIP TO 8A**

__	Full time or Part Time outside the home	**NEED 3**

If employed:
What is your occupation? ____

What industry are you in? ____________________________________

GET A GOOD MIX OF DIFFERENT OCCUPATIONS AND INDUSTRIES

8a. If Not Employed:

__	Retired
__	Student
__	Homemaker
__	In between jobs

GET AT LEAST 1 NOT EMPLOYED.

9. What is the highest level of education you have completed?

DO NOT READ ANSWER CHOICES - GET A MIX

__	Some high school or less
__	High school graduate
__	Some college, vocational or trade school
__	College graduate
__	Graduate school

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

GET A MIX - NO MORE TWO ONE PER AGE GROUP

Under 18 **TERMINATE**

18-29

30-39

40-49

50-59

60-65

66+

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**

TERMINATE IF 1 – GET A MIX

12. Have you ever visited the website IRS DOT 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 tax filing season or calculating withholding changes)

YES NO

17. What ways have you ever contacted the IRS?

___	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

Recruit to obtain 3-5 Individuals

Mix of men and women

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 90 minute evaluation. 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 evaluations sessions with a number of people in your area similar to yourself. You would be attempting tasks on a web site and discussing your experiences w/ that web site. Let me stress again that these evaluations are for research purposes only – we just want your opinions. We also want you to know the IRS will NOT in anyway use your personal information for anything other than the strict usage of it for this particular study. The IRS is just interested in finding out your opinions on the way they have designed their website. Most importantly we want to ensure that the system ends up helping taxpayers.

These evaluation sessions will be held on (Dec. 6 -10, 2010 at **TIME**) at 1001 South 1200 West, Ogden UT. They will last approximately 90 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 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 testing facility. You will also receive a follow-up / reminder call prior to the evaluation session. 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”.

IRS.gov Redesign Usability Study
Tax Professionals Screener
Job

First Name:		**Date**	
Last Name:			
Male / Female (NOTE AT BEGINNING OF INTERVIEW):			
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 DOT GOV? What we would like to do is ask you a few questions to see if you would be able to participate in a 90 minute evaluation of an IRS web site to be scheduled during the week of December 6th. The IRS is interested in finding out your opinions on the way they have designed their site. These evaluations are for research purposes only – we just want your opinions. We also want you to know the IRS will NOT in anyway use your personal information for anything other than the strict usage of it for this particular study. We would pay you to come to the IRS testing facility 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.

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Tax Products Coordinating Committee
SE:W:CAR:MP:T:T:SP
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Because we are seeking a wide variety of people, let me start by asking you some questions about yourself…

1. Do you currently conduct professional tax preparations? **Yes CONTINUE**
No TERMINATE

2. Do you prepare both individual and business returns? **Yes CONTINUE**
No TERMINATE

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? **IF NO SKIP TO Q3**

5. When was the last time you participated in a market research interview or usability study? **TERMINATE 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 TERMINATE

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

IF IRS, TERMINATE

7. Do you have access to the internet at your company? **IF NO TERMINATE**

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… **TERMINATE 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 tax law changes)
YES NO

15. What ways have you ever contacted the IRS?

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

Recruit to obtain 3-5 Tax Professionals / Tax Practitioners

RECRUIT A MIX OF GENDERS

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 90 minute evaluation. This is strictly a research project, and we do not, and are not selling anything, ever.

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These evaluation sessions will be held on (**DATE, TIME**) at 1001 South 1200 West, Ogden UT. They will last approximately 90 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”.

Attachment 2. Recruiting Cover Letter

Consumer Opinion Services, Inc.
2225 Lloyd Center • Portland, Oregon 97232 • **(503) 281-1270 •**
Fax (503) 493-7199

December, 2010

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:	***South 1200 West, Ogden UT***
TIME:	(insert time)
LENGTH:	***2.0 hours (including travel time and 90 minute interview)***
HONORARIUM:	***$75.00***
STUDY TITLE:	CODLS R2B
DIRECTIONS:	Contact Jana Roberts if you get lost. See enclosure
Please check in 10 minutes before the session start time to ensure that we proceed on schedule.	

We have invited only a limited number of people, about 9, 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 #Insert Control Number. 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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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 Interactive Tax Assistant tool on 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 1.5 hours. 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 anonymous 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 #Insert Control Number. 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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5. Scenarios

INDIVIDUALS

Pension and Annuity

1. Background Facts: You want to know if you will have to pay taxes in 2010 for your annuity. Your annuity started on October 10, 1995 after you retired as a private school teacher. Your birth day is May 5, 1954. You are a U.S. citizen. You currently hold a qualified retirement plan. Money was not transferred to a ROTH account or a disability pension. You currently received your payment once a month. Federal taxes have been taken out.

   Using the ITA tool on irs.gov, determine if you will have to pay taxes on your annuity for 2010.

Expected response:
The distribution is partially taxable.

You have a cost to recover.

Because the annuity starting date is after July 1, 1986, and before November 19, 1996, you could have chosen to use either the General Rule or the Simplified Method to determine the taxable portion of your distributions. To figure the taxable amount complete the Simplified Method Worksheet found in the instructions for Form 1040 or Form 1040A or in the back of Publication 575. If you used the General Rule, you should use the Publication 939.

Report your distribution by entering the total distribution amount on the Pension and annuities, line "a" of your tax return. Enter the taxable amount of the distribution on line "b".

Report your withholding on the "federal income tax withheld" line of your tax return, and attach Form 1099-R.

Social Security/Railroad Retirement Benefits

2. Background Facts: This is the first year you started collecting Social Security (2010). You are a U.S. citizen. You are only collecting social security on yourself and you didn't contribute anything to your Roth IRA in 2010. You are paid monthly. The total amount you received this year was $15,000. You also work at the local library were you earn $18,000 a year. You have $500 worth of tax exempt interest. You have no savings bonds or student loans. You have not had federal taxes withheld.

   Using the ITA tool on irs.gov, determine if you have a taxable benefit for 2010.

Expected response:
Your taxable benefit is $500.00.

Worksheet 1 from Publication 915 was used to calculate the taxable amount of the benefits.
If you are required to file a Form 1040 or 1040A, in the 'Income' section of your form, enter $15,000.00 on the 'Social Security Benefits' line and $500.00 as the 'Taxable Amount'.

You may want to consider having federal income tax withheld from your benefits by submitting a Form W-4V or as an alternative, making estimated tax payments.

Cancellation of Debt

3. Background Facts: You are a US citizen who has gotten over their head with the mortgage payments on your personal home. The bank recently approved you for a loan modification. The modification was completed in 2009. The bank sent you a 1099-C and explained to you that you were liable for the debt. You did not file for bankruptcy. You weren't insolvent either. Unfortunately you were forced to incur all of the debts on the home. You purchased your home at $600,000 in 2004 and had paied off all but $150,000 of it. Due to the declining prices of homes in you're the value of your property sunk too low. The bank informed you that after the modification you were still liable for $110,000. Your home was not in a presidentially declared disaster area.

Using the ITA tool on irs.gov, determine you have cancellation of debt income.

Expected response:

You have cancellation of debt income.

Exclusion of Canceled Debt Income

None of the canceled debt income is taxable because you qualify to exclude it as qualified principal residence indebtedness.

Because you have cancellation of debt income that is not taxable due to an exclusion, file Form 982 with your tax return for the year in which the debt was cancelled.
If you exclude canceled debt from income, you must reduce certain tax attributes (but not below zero) by the amount excluded. Use Part II of Form 982 to reduce your tax attributes. See Publication 4681 and the instructions to Form 982 for further information.

Documentation

You should verify that the information on the Form 1099-C matches the facts you provided. Differences in the information should be resolved with the lender.

TAX PROFESSIONALS

4. Background Facts: you are preparing your client's 2007 tax year; your client is neither a resident alien, nor a US citizen; your client is filing Married Filing Jointly with US citizen; both your client and his spouse have valid SSN's for work; your client did not receive Advance Earned Income Credit; your client is not filing Form 2555/2555EZ; your client and his spouse had earned income of $36,000 for the year with part of earned income being non-taxable combat pay; part of your client's earned income is from clergy pay; your client's adjusted gross income is $23,000; your client did not have investment income; neither your client nor his spouse is a qualifying child for another taxpayer; your client and his spouse have three qualifying children; your client and his spouse have never had Earned Income Credit reduced.

   Using the ITA tool on irs.gov, determine if your client qualifies for the Earned Income Tax Credit for tax year 2007.

   Expected response: Your client is eligible for the Earned Income Tax Credit based on having a qualified child. .

5. Background Facts: you are preparing a return for your client for tax year 2008; your client is a US citizen with no foreign sourced income; your client cannot be claimed as dependent; your client's filing status is HOH; your client's DOB is 01/04/1970; your client did not receive social security Benefits; your client's total gross income $7509 but did not have any withholding or estimated taxes paid; your client did not qualify for any credits; your client owes ten percent additional tax on IRA distributions, that is only additional tax.

   Using the ITA tools on irs.gov, determine if your client has to file a tax return.

   Expected response: Your client is required to file a tax return because your client has to report a tax on a Qualified Plan; however, your client may file Form 5329, Additional Taxes on Qualified Plan (including IRAs) and Other Tax-Favored Accounts, by itself, instead of filing a tax return.

   Using the summary screen, make changes to your input to show that your client does not owe any taxes on a Qualified Plan, then determine if your client has to file a tax return.

   Expected response: Your client is not required to file a tax return because your client's gross income does no exceed the threshold amount for her filing status and age

6. Background Facts: Your client is concerned with 2009 tax year; your client is single and has a 4 yrs old son; both your client and her son (George) are US citizens; your client has only the one son as a possible qualifying child; DOB 02/02/2005; your client's son lived with her the entire year; your client's son did not provide more than one-half of his own support for the year; your client is claiming the son as a dependent; your client's AGI is $74,300.00; your client is not claiming exclusion for income earned outside of US; your client's tax liability is $7,100; your client is not allowed any other tax credit.

   Using the ITA tool on irs.gov, determine your client's filing status.

   Expected response: Your client's filing status is HOH

   Using the search feature of the ITA tool on irs.gov, search for tax law guidance on the Child Tax Credit to determine if your client will get the child tax credit for her son.

   Expected response: The child/children qualify you for the Child Tax Credit. You child tax credit amount is $1,000.00. Report the child tax credit on the designated line of Form 1040. You must provide a valid taxpayer identification number for each qualifying child.

VISUALLY IMPAIRED INDIVIDUALS

7. Background Facts: You are completing a 2007 return; you were a US citizen for the entire year; your marital status on the last day of the tax year is single; you had SSN valid for employment; you did not receive Advance Earned Income Credit; you are not filing Form 2555/2555EZ; you had wages of $21,000; you did not have any non-taxable combat pay; your adjusted gross income was $23,000; you did not have any investment income; you are a qualifying child of our parents.

   Using the ITA tool on irs.gov, determine if you qualify for the Earned Income Credit for tax year 2007?

   Expected response: You cannot claim the Earned Income Tax Credit because you are a qualifying child of another taxpayer.

8. Background Facts: You are is preparing 2008 return; you are a US citizen; you do not have foreign sourced income; you cannot be claimed as dependent; your filing status is QW; you are legally blind; your DOB is 01/02/1970; your gross income $12,345; you do not meet any other situations to require filing; you had no federal withholding nor estimated tax credits, you qualify for EIC, you do not receive SS benefits; you do not owe any taxes from tax favored accounts.

   Using the search feature from the ITA tool on irs.gov, search for tax law guidance on who must file to determine if you have to file a tax return.

   Expected response: You should file a tax return because it may generate a refund. However, you are not required to file at ax return because you do not meet or exceed the $14,400 threshold amount based on your filing status and age.

9. Background Facts: You are concerned with 2009; you are a US citizen; your marital status is married; your spouse is neither a US citizen nor resident alien; you and your spouse will not file MFJ; you and your spouse did not live together the last 6 months of the year; you paid more than half the cost of keeping up a home; you have a child age twelve; your child lived in your home for nine months of the year; your child is not being claimed as a dependent; you are treated as the custodial parent; you are not claiming the child only because the non-custodial parent has written authorization to claim the child; you will be claiming the child tax credit and earned income credit.

   Using the ITA tool on irs.gov, determine your filing status.

   Expected response: The most beneficial filing status for your situation is head of household.

   Using the summary screen, make changes to your input to show that your child lived in your home for four months of the year, then determine your filing status.

   Expected response: Your filing status is single.

6. 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 Interactive Tax Assistant (ITAs) using the navigation within the application?**

Very Hard	Hard	Slightly Hard	Slightly Easy	Easy	Very Easy

Comments:

2. **Did the the navigation make sense to you?**

YesNo

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:

Search Feature

5. How would you rate the difficulty of initially finding the search box on the ITAs landing page?

Very Hard	Hard	Slightly Hard	Slightly Easy	Easy	Very Easy

Comments:

6. Did you understand the purpose of the search term field?

Yes No

Comments:

7. Did the ITAs search function return useful results?

Yes No

Comments:

Aesthetics

8. To what degree did you find the ITAs landing page visually attractive?

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

Comments:

9. How would you rate the amount of information on each page?

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

Comments:

Other Features

10. Please list any features you expected on the ITA pages but did not find.

11. What other improvements would make it easier to find and read content?

12. Do you have overall suggestions for improvement of the ITA tool?

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 #Insert Control Number. 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:

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

7. 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 #Insert Control Number. 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)***
LOCATION:	***South 1200 West, Ogden UT***
TIME:	(insert time)
LENGTH:	***2.0 hours (including travel time and 90 minute interview)***
HONORARIUM:	***$75.00***
STUDY TITLE:	Website Updates Usability Study
DIRECTIONS:	Contact Jana Roberts if you get lost. See enclosure

Please check in 10 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 Interactive Tax Assistant 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**]