

Telephone/ Participant Screeners Questionnaire
IRS.gov Redesign Usability Study
Individuals Screener
Job #

First Name:	<input type="text"/>	Date	<input type="text"/>
Last Name:	<input type="text"/>		
Male / Female	<input type="text"/>		
(NOTE AT BEGINNING OF INTERVIEW):	<input type="text"/>		
Address/Location:	<input type="text"/>		
Telephone #'s:	<input type="text"/>	Appt date	<input type="text"/>
Interviewer:	<input type="text"/>	Appt time	<input type="text"/>
Comments:	<input type="text"/>		

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 60 minute evaluation of an IRS web site to be scheduled during the week of Nov. 3. 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 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 Re1545-1349venue 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?

<input type="checkbox"/>	Marketing, Market Research Firm	IF YES TO ANY TERMINATE
<input type="checkbox"/>	Advertising	
<input type="checkbox"/>	Web Site Design Company	
<input type="checkbox"/>	For a city, state or federal government agency? If so, which one?	

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**

<input type="checkbox"/> Full time or Part Time outside the home	NEED 3
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If employed:
What is your occupation? _____

What industry are you in? _____

GET A GOOD MIX OF DIFFERENT OCCUPATIONS AND INDUSTRIES

8a. If Not Employed:

<input type="checkbox"/> Retired
<input type="checkbox"/> Student
<input type="checkbox"/> Homemaker
<input type="checkbox"/> 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

<input type="checkbox"/> Some high school or less
<input type="checkbox"/> High school graduate
<input type="checkbox"/> Some college, vocational or trade school
<input type="checkbox"/> College graduate
<input type="checkbox"/> 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
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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?

<input type="checkbox"/>	to find forms
<input type="checkbox"/>	to review tax regulations
<input type="checkbox"/>	to find phone numbers
<input type="checkbox"/>	file downloads
<input type="checkbox"/>	online tax tools
<input type="checkbox"/>	other _____

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

<input type="checkbox"/>	less than 15 minutes
<input type="checkbox"/>	15 minutes to 30 minutes
<input type="checkbox"/>	30 minutes to 1 hour
<input type="checkbox"/>	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?

<input type="checkbox"/>	visited a local branch
<input type="checkbox"/>	phone call
<input type="checkbox"/>	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

<input type="checkbox"/>	Single
<input type="checkbox"/>	Married/Living with partner
<input type="checkbox"/>	Widowed
<input type="checkbox"/>	Divorced/Separated

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 \$125, simply for sharing more of your opinions with us in a 60 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 **(DATE, TIME)** at Accenture building in Reston, VA. 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 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:	<input style="width: 95%;" type="text"/>	Date	<input style="width: 95%;" type="text"/>
Last Name:	<input style="width: 98%;" type="text"/>		
Male / Female (NOTE AT BEGINNING OF INTERVIEW):	<input style="width: 98%;" type="text"/>		
Address/Location:	<input style="width: 98%;" type="text"/>		
Telephone #'s:	<input style="width: 45%;" type="text"/>	Appt date	<input style="width: 45%;" type="text"/>
	<input style="width: 45%;" type="text"/>	Appt time	<input style="width: 45%;" type="text"/>
Interviewer:	<input style="width: 98%;" type="text"/>		
Comments:	<input style="width: 98%; height: 100px;" type="text"/>		

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 60 minute evaluation of an IRS web site to be scheduled during the week of Nov. 3. 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]

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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**

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**

<input type="checkbox"/>	1 – 10 Employees
<input type="checkbox"/>	10 – 50 Employees
<input type="checkbox"/>	50 – 1000 Employees
<input type="checkbox"/>	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?

<input type="checkbox"/>	Marketing, Market Research Firm
<input type="checkbox"/>	Advertising
<input type="checkbox"/>	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?

<input type="checkbox"/>	to find forms
<input type="checkbox"/>	to review tax regulations
<input type="checkbox"/>	to find phone numbers
<input type="checkbox"/>	file downloads
<input type="checkbox"/>	online tax tools
<input type="checkbox"/>	other _____

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

<input type="checkbox"/>	less than 15 minutes
<input type="checkbox"/>	15 minutes to 30 minutes
<input type="checkbox"/>	30 minutes to 1 hour
<input type="checkbox"/>	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?

<input type="checkbox"/>	visited a local branch
<input type="checkbox"/>	phone call
<input type="checkbox"/>	spoken with a specific representative

**Recruit to obtain 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 60 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 evaluation 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 with 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 that the IRS will NOT in any way 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 web site. Most importantly we want to ensure that the system ends up helping taxpayers.

These evaluation sessions will be held on **(DATE, TIME)** at Accenture building in Reston, VA. 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".

**IRS.gov Redesign Usability Study
Business Screener
Job #**

First Name:	<input type="text"/>	Date	<input type="text"/>
Last Name:	<input type="text"/>		
Male / Female (NOTE AT BEGINNING OF INTERVIEW):	<input type="text"/>		
Address/Location:	<input type="text"/>		
Telephone #'s:	<input type="text"/>	Appt date	<input type="text"/>
	<input type="text"/>	Appt time	<input type="text"/>
Interviewer:	<input type="text"/>		
Comments:	<input type="text"/>		

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 60 minute evaluation of an IRS web site to be scheduled during the week of Nov. 3. 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]

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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**

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

1. 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.

2. How 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? **BOTH MUST BE 1-3**

My job requires me to know what tax forms the company needs to file by what dates.	1	2	3	4	5
My job requires me to understand the tax laws and rules that apply to the company.	1	2	3	4	5

3. 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 Q6**

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

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

<input type="checkbox"/>	Marketing, Market Research Firm
<input type="checkbox"/>	Advertising
<input type="checkbox"/>	Web Site Design Company

IF YES TO ANY TERMINATE

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

IF IRS, TERMINATE

6. Do you have access to the internet? **IF NO TERMINATE**

7. 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
using a scroll bar					

8. 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

9. Have you ever visited the website IRS DOT GOV?

YES

NO SKIP TO Q15

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

<input type="checkbox"/> to find forms
<input type="checkbox"/> to review tax regulations
<input type="checkbox"/> to find phone numbers
<input type="checkbox"/> file downloads
<input type="checkbox"/> online tax tools
<input type="checkbox"/> other _____

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

<input type="checkbox"/> less than 15 minutes
<input type="checkbox"/> 15 minutes to 30 minutes
<input type="checkbox"/> 30 minutes to 1 hour
<input type="checkbox"/> longer than 1 hour

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

13. Was the information you were seeking on the website different depending on the season?
(such as quarterly filing or tax law changes)
YES NO

14. What ways have you ever contacted the IRS?

<input type="checkbox"/>	visited a local branch
<input type="checkbox"/>	phone call
<input type="checkbox"/>	spoken with a specific representative

**Recruit to obtain 5 Businesses
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 website usability study. You will receive \$125.00, simply for sharing more of your opinions with us in a 60 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 evaluations sessions will be held on **(DATE, TIME)** at Accenture building in Reston, VA. 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 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 "XXXXXX".



2. Recruiting Cover Letter

Consumer Opinion Services, Inc.

2225 Lloyd Center • Portland, Oregon 97232 • (503) 281-1270 • Fax (503) 493-7199

November, 2008

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:	11951 Freedom Drive Reston, VA 20190
TIME:	(insert time)
LENGTH:	1.5 hours (including travel time and 60 minute interview)
HONORARIUM:	\$125.00
STUDY TITLE:	Pick List Redesign Usability Study
DIRECTIONS:	Contact Beth Krappweis 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 6, 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:
**Internal Revenue Service
Tax Products Coordinating Committee
SE:W:CAR:MP:T:T:SP
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 private 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:

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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**

5. Scenarios

INDIVIDUALS

1. 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"

2. 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. Find the form number and the instructions for the form.

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

3. Using the IRS.gov website find form 1099-G. **Without downloading the PDF file**, are you able to print this form from your home computer?

[Target = "More Forms and Publications" > "Form and Instruction Number" > "2006 Form 1099-G Certain Government and Qualified State Tuition Program Payments"

Answers:

a. No

b. Yes

c. I don't know

TAX PROFESSIONALS

1. 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. Find the form number and the instructions for the form.

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

2. Download forms 1023, 1024, and 8718 from the IRS website. What are your thoughts about this process?

<http://www.irs.gov/formspubs/lists/0,,id=97817,00.html>

BUSINESSES

1. 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, Forms and Instructions" < "Instruction 8594 (PDF)" OR "Form 8594"

2. Download forms 1023, 1024, and 8718 from the IRS website. What are your thoughts about this process?

<http://www.irs.gov/formspubs/lists/0,,id=97817,00.html>

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 Pick Lists using the navigation within the application?**

Very Hard	Hard	Slightly Hard	Slightly Easy	Easy	Very Easy
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Comments:

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

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
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Comments:

Search Feature

5. How would you rate the difficulty of initially finding the search box on the Pick Lists?

Very Hard	Hard	Slightly Hard	Slightly Easy	Easy	Very Easy
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Comments:

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

Yes No

Comments:

7. Did the Pick Lists search function return useful results?

Yes No

Comments:

Aesthetics

8. To what degree did you find the Pick Lists visually attractive?

Not Attractive At All	Not Attractive	Slightly Unattractive	Slightly Attractive	Attractive	Very Attractive
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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
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Comments:

Other Features

10. Please list any features you expected in the Pick Lists 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 Pick Lists?

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 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:

**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 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.**

<p><i>DATE:</i> (insert date) <i>TIME:</i> (insert time)</p> <p><i>LOCATION:</i> Accenture Building, Reston, VA <i>DIRECTIONS:</i> See enclosure</p> <p><i>LENGTH:</i> 1.5 hours (including travel time and 60 minute interview)</p>
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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 FAQs 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 \$125 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**].