

Supporting Statement
Approval Request to Conduct Customer Satisfaction Research (OMB #1545-1349) For
IRS' Digital Delivery Services

A. JUSTIFICATION

1. Circumstances Making the Collection of Information Necessary

Currently IRS.gov is the most utilized public interaction tool. It is one of the easiest and cheapest ways for the public to interact with the IRS. The IRS.gov website will be newly redesigned and we want this opportunity to be able to get initial feedback from the public about what has been done. In addition, with direct access to the tax professional community we will be able to better refine the newly created “for taxpros” area of the site.

We also plan on getting feedback regarding what types of interactions tax professionals want to do with their mobile devices, whether it's through a mobile website or via a mobile application.

2. Purpose and Use of the Information Collection

The purpose of the focus group “Design IRS Digital Delivery” is to reach out to the public and understand what they are looking for with regards to tools, applications and layout for interactions with IRS. We are looking to gain insight about the website, mobile Web and mobile app.

3. Consideration Given to Information Technology

The focus group will be completed as an informal discussion session. Screen shots of ideas may be developed and shared during the focus groups. Questions will be asked in person during the sessions.

4. Duplication of Information

Prior focus groups have not been conducted on the new digital delivery services of IRS.

5. Reducing the Burden on Small Entities

Careful consideration has been given to reduce burden time of those participating. Since we will be talking with participants about 4 different services we will only take the allotted time outlined by the forum session. In addition, since this is considered part of the Tax Forum there will be no burden on the participants outside of the conference.

6. Consequences of Not Conducting Collection

Not conducting this research will not allow the IRS to understand and meet our users' needs and wants. Additionally, the White House and OMB recently released a document outlining the responsibilities agencies have to “Build a 21st Century Platform (<http://www.whitehouse.gov/sites/default/files/omb/egov/digital-government/digital-government-strategy.pdf>). Without information obtained through these focus groups we will not be able to meet the White House and OMB initiatives outlined in the document.

7. Special Circumstances

There are no special circumstances. The information collected will be voluntary and will not be used for statistical purposes.

8. Consultations with Persons Outside the Agency

The Focus groups will be conducted with individuals from the Tax Professional community; however, we will not be consulting with any outside agency.

9. Payment or Gift

No payment or gift will be given for participation.

10. Confidentiality

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

During the testing sessions, participants will be identified to IRS personal by their first names only. In addition, no participant names will be mentioned in the usability study final report. Participants will be advised that observers from the IRS may be observing the session.

11. Sensitive Nature

No questions will be asked of sensitive or personal nature.

12. Burden of Information Collection

The estimated participation time for the focus group is 60 minutes. Based on a potential sample of 90 and assuming a 2/3rds acceptance rate, the total annual burden hours requested (61.5 hrs) are based on the number of collections we expect to conduct over the requested period for this clearance.

Type of Collection	No. of Respondents	Minutes per Response	Total Hours
Asking customers to participate	90	1 minute	1.5 hrs (90*1/60)
Participation in Focus Group	10 per session (60 total)	60 minutes	60 hrs (60*60/60)
Total			61.5 hrs

13. Costs to Respondents

Not Applicable.

14. Costs to Federal Government

The one-time cost for this focus group is \$13,000

15. Reason for Change

Not applicable.

16. Tabulation of Results, Schedule, Analysis Plans

17. Display of OMB Approval Date

Not applicable

18. Exceptions to Certification for Paperwork Reduction Act Submissions

These activities comply with the requirements in 5 CFR 1320.9.

19. Dates Collection Begin and End

Testing will occur July 17-19, 2012, July 31 - August 2, 2012 and August 28-30,2012.

B. STATISTICAL METHODS

1. Universe and Respondent Selection

Tax Professionals will be asked to participate in the focus group using the below criteria.

Type of Collection	No. of Respondents	Minutes per Response	Total Hours
Asking customers to participate	90	1 minute	1.5 hrs (90*1/60)
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- General knowledge of the internet with frequent use of the internet
- General knowledge of tax filing and processing
- Knowledge of / responsible for individual tax filing
- Current or potential user of mobile and table applications

2. Procedures for Collecting Information

The purpose of conducting these focus groups is to ensure that we are meeting our user’s needs with our website and mobile interactions.

The following are examples of objectives that address these areas.

- Content
 - o Content needs to be clear and concise
 - o Writing for the web practices need to be used
 - o Bullets, instead of long paragraphs
 - o Examples if necessary
 - o Help Content is easily understood
 - o Information displayed regarding user’s tax information is easily understood

- Navigation
 - o Can user's move through the application without feeling lost
 - o Error recovery rate
 - o Do user's understand where they are within the application
- Design
 - o Easy to understand design
 - o Clean and concise
 - o Overall opinion of look and feel
- Tool availability
 - o Are available tools what users want and need

3. Methods to Maximize Response

We will be utilizing a live version of the redesigned IRS.gov site to gain feedback about the website. Users will be taken, in a group setting, through various pages of IRS.gov, based on what they say they use most on IRS.gov.

For the mobile site and the mobile applications, including tablet devices we will be taking users through a demo and screen shots of potential updates and new and existing tools and services available.

Data will be collected to evaluate the following areas;

- Usability
- Ease of use for each tool/ service
- Need
- Want
- Device type

4. Testing of Procedures

There will be a total of 10 to 15 participants for each session. The focus group will split the users into smaller groups where they will spend some time with each topic (website, mobile site, and mobile app) and discuss the good, the bad, and the needs improvement.

Discussion will be collected based on prompt questions created by the Online Services Division.

The moderator will complete an introduction, and provide an overview of the process and ask the participant to sign a consent form. The form will explain what the participant is going to be doing and how the IRS plans to use the information gathered from the discussion.

No personally identifiable information will be shared during testing.

After the introduction participants will work in small groups to discuss each topic. Participants will be required to discuss aloud and share their thoughts and opinions about the different topics. During this time the focus group team will be taking notes and making minor updates to the designs to gain more insights from participants.

When the participant has completed the session there will be a debriefing session that will consist of open discussion.

Testing will occur July 17-19, 2012, July 31 - August 2, 2012 and August 28-30,2012.

5. Contacts for Statistical Aspects and Data Collection

For questions regarding the focus group contact:

Beth Krappweis
OLS, Online Experience and Operations Management
Beth.A.Krappweis@irs.gov
202-283-4844

Attachments

1. Moderator Checklist
2. Consent Form
3. Prompting Questions