# **TPPS Nationwide Usability Study**

## **Tax Professionals Screener**

Hello, I'mfrom the Internal Revenue Service. We are conducting a research study on the Tax Professional PTIN System (TPPS). Would you be available on Tuesday or Wednesday to help us with this study? Have you heard about the TPPS site? 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 the site. The IRS wants to hear from you and is very interested in your opinions. Would you be willing to answer a few questions to see if you qualify?
[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
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.	Do١	/ou	pre	pare
		,	P. ~	P 41 4

Both 1040 and business clients	
Complex returns (multiple W-2s, 1099s, deductions, etc.)	

### **Yes CONTINUE**

#### No TERMINATE

- 3. Do you use the internet at your company? IF NO TERMINATE
- 4. 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

5. Have you ever visited the website IRS DOT GOV? YES

NO

Thank you for answering my questions. Will you be available to conduct this 60 minute evaluation on (Tues. or Wednesday) in room XXX? This is strictly a research project, and we do not, and are not selling anything, ever.

Date	Time	Activity	Participant
Tues - Wed	8:00 a.m 9:00 a.m.	Test	
Tues - Wed	9:00 a.m 10:00 a.m.	Test	
Tues - Wed	10:00 a.m 11:00 a.m.	Test	
Tues - Wed	11:00 a.m 12:00 p.m.	Test	
Tues - Wed	1:00 p.m 2:00 p.m.	Test	
Tues - Wed	2:00 p.m 3:00 p.m.	Test	

This is how our process works: As part of our research, we will be conducting evaluation sessions with a number of people similar to yourself. You would be attempting tasks on the 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.

Do you have any questions up to this point?

(Aswer 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. If something should change in your participation availability, please contact us using the information in the letter provided to you.

Thank you for volunteering for this study and we will see you at [TIME & DATE] room XXX.

#### **Moderator Checklist for Usability Test Sessions**

- 1. Introduce yourself and other team members who might interact with the participant (i.e., logger, observation facilitator.)
- 2. Talking points to cover in verbal session overview:
  - Discuss the purpose of usability testing / this usability test.
  - 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 the participant that he/she is helping us evaluate the site we are not evaluating him/her
- 3. Explain to the participant that they will work through a specific, representative scenarios by entering the appropriate data into the TPPS screens to attempt to secure a PTIN (only mocked up test data will be used).
- 4. Ask the participant if he/she has any questions.
- 5. Have participant begin task.
- 6. Ask if he/she has any other comments about the TPPS application.

Thank volunteer for their participation.

#### **Scenarios**

To avoid any potential problems with participants' personal information, each participant will receive a fabricated persona containing information to sign up for the system and to register for their PTIN. All information for each persona will be provided on a separate data sheet. There are five basic user personas designed to demonstrate the full range of tax professionals expected to use the system. Approximately 8-10 individual cases were created for each persona.

Personas will be assigned to volunteers based on their background. For example, if the participant is a CPA who currently has a PTIN, they will receive the persona for the CPA with PTIN to use while testing the system.

Each separate test data sheet will contain the following 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. **The time estimated for your participation is 1 hour.** 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.

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				Address -				
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Name	Persona	SSN	Date of Birth	tax return address	Tax Return Info.	Professional Credentials	Employment Information	
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	you acquired just over a						Services 1145 Constitution	
	year ago.			22567 Main	Year – 2009,		Ave.	
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Mimi Imfurst	PTIN is P00071171.	111-22- 3303	17-Sep-76	Herndon, VA 20171	– Married Filing Jointly	ID #: 334675 State: VA	22074 (Ph) 202-555-7788	
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Mimi Imfurst	PTIN is P00068247.	111-22- 3304	17-Sep-76	Herndon, VA 20171	– Married Filing Jointly	ID #: 334675 State: VA	22074 (Ph) 202-555-7788	
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Mimi Imfurst	P00067771.	3306	17-Sep-76	20171	Filing Jointly	State: VA	(Ph) 202-555-7788	
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	year ago. Your current			St Main	Filing Status	CPA	Ave. Washington, DC	
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Mimi Imfurst	P00083869.	3309	17-Sep-76	20171	Filing Jointly	State: VA	(Ph) 202-555-7788	
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Mimi Imfurst	P11N IS P00100100.	3303	17-Sep-76	20171	Filing Jointly	State: VA	(Ph) 202-555-7788	
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Mimi Imfurst	P11N IS P00100072.	3303	17-Sep-76	VA 20171	Filing Jointly	VA VA	7788	
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	accountant (CPA) with a PTIN that you acquired just over a year ago. Your current PTIN is P00100012.			20171	Filing Jointly		Ave. Washington, DC 22074 (Ph) 202-555-7788	
Mimi Imfurst	You are a certified public accountant (CPA) with a PTIN that you acquired just over a year ago. Your current PTIN is P00100160.	111-22- 3303	17-Sep-76	22567 Main St Herndon, VA 20171	Year – 2009, Filing Status – Married Filing Jointly	CPA ID #: 334675 State: VA	Smith's Accounting Services 1145 Constitution Ave. Washington, DC 22074 (Ph) 202-555-7788	
Mimi Imfurst	You are a certified public accountant (CPA) with a PTIN that you acquired just over a year ago. Your current PTIN is P00100076.	111-22- 3303	17-Sep-76	22567 Main St Herndon, VA 20171	Year – 2009, Filing Status – Married Filing Jointly	CPA ID #: 334675 State: VA	Smith's Accounting Services 1145 Constitution Ave. Washington, DC 22074 (Ph) 202-555-7788	
Crystal Shanda- Leer	You are a certified public accountant (CPA) trying to obtain a PTIN.	111-22- 3312	25-Jun-81	5589 Deer Field Ave. Indianapolis, IN. 44716	Year - 2008 Filing Status - Single	CPA ID#: 445876 State: IN	Crowe's Accounting Firm 6598 Circle Center Dr. Suite 234 Indianapolis, IN 44723	
Crystal Shanda- Leer	You are a certified public accountant (CPA) trying to obtain a PTIN.	111-22- 3313	25-Jun-81	5589 Deer Field Ave. Indianapolis, IN. 44716	Year - 2008 Filing Status - Single	CPA ID#: 445876 State: IN	Crowe's Accounting Firm 6598 Circle Center Dr. Suite 234 Indianapolis, IN 44723	
Crystal Shanda- Leer	You are a certified public accountant (CPA) trying to obtain a PTIN.	111-22- 3314	25-Jun-81	5589 Deer Field Ave. Indianapolis, IN. 44716	Year - 2008 Filing Status - Single	CPA ID#: 445876 State: IN	Crowe's Accounting Firm 6598 Circle Center Dr. Suite 234 Indianapolis, IN 44723	
Crystal Shanda- Leer	You are a certified public accountant (CPA) trying to obtain a PTIN.	111-22- 3315	25-Jun-81	5589 Deer Field Ave. Indianapolis, IN. 44716	Year - 2008 Filing Status - Single	CPA ID#: 445876 State: IN	Crowe's Accounting Firm 6598 Circle Center Dr. Suite 234 Indianapolis, IN 44723	
Crystal Shanda- Leer	You are a certified public accountant (CPA) trying to obtain a PTIN.	111-22- 3316	25-Jun-81	5589 Deer Field Ave. Indianapolis, IN. 44716	Year - 2008 Filing Status - Single	CPA ID#: 445876 State: IN	Crowe's Accounting Firm 6598 Circle Center Dr. Suite 234 Indianapolis, IN 44723	
Crystal Shanda-	You are a	111-22-	25-Jun-81	5589 Deer	Year - 2008	СРА	Crowe's Accounting	

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Leer Crystal Shanda- Leer	certified public accountant (CPA) trying to obtain a PTIN. You are a certified	3317 111-22- 3318	25-Jun-81	Field Ave. Indianapolis, IN. 44716 5589 Deer Field Ave.	Filing Status - Single Year - 2008 Filing	ID#: 445876 State: IN CPA ID#: 445876	Firm 6598 Circle Center Dr. Suite 234 Indianapolis, IN 44723 Crowe's Accounting Firm
Leei	public accountant (CPA) trying to obtain a PTIN.	3310		Indianapolis, IN. 44716	Status - Single	State: IN	6598 Circle Center Dr. Suite 234 Indianapolis, IN 44723
	You are an enrolled Agent (EA) with a PTIN that you have had for the last 4 years. Your			66985 Decker Way	Year - 2006 Filing Status -		Tax Pro's of Wyoming 47158 Bloom Hall
Patty O'Block	current PTIN is P00019665.	111-22- 3319	14-Apr-58	Springfield, WY. 55689	Married Filing Separately	EA ID#: 99817 State: WY	Dr. Springfield, WY 55688
	You are an enrolled Agent (EA) with a PTIN that you have had for the last 4		·	66985	Year - 2006 Filing		Tax Pro's of Wyoming
Patty O'Block	years. Your current PTIN is P00063527.	111-22- 3320	14-Apr-58	Decker Way Springfield, WY. 55689	Status - Married Filing Separately	EA ID#: 99817 State: WY	47158 Bloom Hall Dr. Springfield, WY 55688
Patty O'Block	You are an enrolled Agent (EA) with a PTIN that you have had for the last 4 years. Your current PTIN is P00003980.	111-22- 3321	14-Apr-58	66985 Decker Way Springfield, WY. 55689	Year - 2006 Filing Status - Married Filing Separately	EA ID#: 99817 State: WY	Tax Pro's of Wyoming 47158 Bloom Hall Dr. Springfield, WY 55688
Patty O'Block	You are an enrolled Agent (EA) with a PTIN that you have had for the last 4 years. Your current PTIN is P00030204.	111-22- 3322	14-Apr-58	66985 Decker Way Springfield, WY. 55689	Year - 2006 Filing Status - Married Filing Separately	EA ID#: 99817 State: WY	Tax Pro's of Wyoming 47158 Bloom Hall Dr. Springfield, WY 55688
Patty O'Block	You are an enrolled Agent (EA) with a PTIN that you have had for the last 4 years. Your current PTIN is P00070170.	111-22- 3323	14-Apr-58	66985 Decker Way Springfield, WY. 55689	Year - 2006 Filing Status - Married Filing Separately	EA ID#: 99817 State: WY	Tax Pro's of Wyoming 47158 Bloom Hall Dr. Springfield, WY 55688
Patty O'Block	You are an	111-22-	14-Apr-58	66985	Year - 2006	EA	Tax Pro's of

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Patty O'Block	P00045160.	3325	14-Apr-58	55689	Separately	State: WY	55688
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Patty O'Block	P00092153.	3326	14-Apr-58	55689	Separately	State: WY	55688
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D OIDLL	PTIN is	111-22-	14 Apr E0	WY.	Filing	ID#: 99817	Springfield, WY
Patty O'Block	P00100088.	3319	14-Apr-58	55689	Separately	State: WY	55688
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Patty O'Block	P00100120.	3319	14-Apr-58	55689	Separately	State: WY	55688
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	current			Springfield,	Married	EA	47158 Bloom Hall   Dr.
	PTIN is	111-22-		WY.	Filing	ID#: 99817	Springfield, WY
Patty O'Block	P00100196.	3319	14-Apr-58	55689	Separately	State: WY	55688
Patty O'Block	You are an	111-22-	14-Apr-58	66985	Year - 2006	EA	Tax Pro's of
	enrolled	3319		Decker Way	Filing	ID#: 99817	Wyoming
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Patty O'Block	P00100148.	3319	14-Apr-58	55689	Separately	State: WY	55688	
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Patty O'Block	P11N IS P00100028.	3319	14-Apr-58	55689	Separately	State: WY	Springfield, WY	/ J
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Ida Dunnit	get a PTIN.	3330	2-Mar-72	96842	Single	None	96847	
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Ida Dunnit	You are	111-22-	2-Mar-72	11346	Year - 2007	None	J.S. Tax Prepation	

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	were made			Mystic			
	aware that			Valley Pl.			
	you need to			Medford,	Filing		66854 Trevose Ln.
	register to			MA.	Status -		Boston, MA
	get a PTIN.	3331		96842	Single		96847
	You are	0001		00012	Olligio		33311
	new to the						
	tax						
	preparation			44040			
	world and			11346			
	were made			Mystic	l		
	aware that			Valley Pl.	Year - 2007		J.S. Tax Prepation
	you need to			Medford,	Filing		66854 Trevose Ln.
	register to	111-22-		MA.	Status -		Boston, MA
Ida Dunnit	get a PTIN.	3332	2-Mar-72	96842	Single	None	96847
	You are						
	new to the						
	tax						
	preparation						
	world and			11346			
	were made			Mystic			
	aware that			Valley Pl.	Year - 2007		J.S. Tax Prepation
	you need to			Medford,	Filing		66854 Trevose Ln.
	register to	111-22-		MA.	Status -		Boston, MA
Ida Dunnit			2-Mar-72			None	
Ida Dunnit	get a PTIN. You are	3333	2-1VId1-12	96842	Single	None	96847
	new to the						
	tax						
	preparation						
	world and			11346			
	were made			Mystic			
	aware that			Valley Pl.	Year - 2007		J.S. Tax Prepation
	you need to			Medford,	Filing		66854 Trevose Ln.
	register to	111-22-		MA.	Status -		Boston, MA
Ida Dunnit	get a PTIN.	3334	2-Mar-72	96842	Single	None	96847
	You have				- 3 -		
	been a tax						
	preparer for						
	the past 7						
	years and			862			
	currently				Voor 2000		
	have a			Cinnamon	Year - 2009		TayorFilod4LL
	PTIN. Your			Cir.	Filing		TaxesFiled4U
	current	144.05		Hershey,	Status -		1795 Almond Ln.
	PTIN is	111-22-		PA.	Married	l	Hershey, PA
Marsha Mellow	P00008164.	3335	26-Jul-79	33681	filing jointly	None	33681
	You have						
	been a tax						
	preparer for						
	the past 7						
	years and						
	currently			862			
	have a			Cinnamon	Year - 2009		
	PTIN. Your			Cir.	Filing		TaxesFiled4U
	current			Hershey,	Status -		1795 Almond Ln.
	PTIN is	111-22-		PA.	Married		Hershey, PA
Marsha Mellow	P00047514.	3336	26-Jul-79	33681	filing jointly	None	33681
141012110 IMEIIUW		3330	20-Jui-19	33001	ining joining	INUITE	33001
	You have						
	been a tax						
	preparer for						
	the past 7			862			
	years and			Cinnamon	Year - 2009		
	currently			Cir.	Filing		TaxesFiled4U
	have a			Hershey,	Status -		1795 Almond Ln.
	PTIN. Your	111-22-		PA.	Married		Hershey, PA
Marsha Mellow	current	3337	26-Jul-79	33681	filing jointly	None	33681
-	•			•	,	•	

	PTIN is P00059756.							
Marsha Mellow	You have been a tax preparer for the past 7 years and currently have a PTIN. Your current PTIN is P00100140.	111-22- 3338	26-Jul-79	862 Cinnamon Cir. Hershey, PA. 33681	Year - 2009 Filing Status - Married filing jointly	None	TaxesFiled4U 1795 Almond Ln. Hershey, PA 33681	
Marsha Mellow	You have been a tax preparer for the past 7 years and currently have a PTIN. Your current PTIN is P00100032.	111-22- 3339	26-Jul-79	862 Cinnamon Cir. Hershey, PA. 33681	Year - 2009 Filing Status - Married filing jointly	None	TaxesFiled4U 1795 Almond Ln. Hershey, PA 33681	
Marsha Mellow	You have been a tax preparer for the past 7 years and currently have a PTIN. Your current PTIN is P00100132.	111-22- 3340	26-Jul-79	862 Cinnamon Cir. Hershey, PA. 33681	Year - 2009 Filing Status - Married filing jointly	None	TaxesFiled4U 1795 Almond Ln. Hershey, PA 33681	
Marsha Mellow	You have been a tax preparer for the past 7 years and currently have a PTIN. Your current PTIN is P00100000.	111-22- 3341	26-Jul-79	862 Cinnamon Cir. Hershey, PA. 33681	Year - 2009 Filing Status - Married filing jointly	None	TaxesFiled4U 1795 Almond Ln. Hershey, PA 33681	
Marsha Mellow	You have been a tax preparer for the past 7 years and currently have a PTIN. Your current PTIN is P00100108.	111-22- 3342	26-Jul-79	862 Cinnamon Cir. Hershey, PA. 33681	Year - 2009 Filing Status - Married filing jointly	None	TaxesFiled4U 1795 Almond Ln. Hershey, PA 33681	
Marsha Mellow	You have been a tax preparer for the past 7 years and currently have a PTIN. Your current PTIN is P00100172.	111-22- 3342	26-Jul-79	862 Cinnamon Cir. Hershey, PA. 33681	Year - 2009 Filing Status - Married filing jointly	None	TaxesFiled4U 1795 Almond Ln. Hershey, PA 33681	
Marsha Mellow	You have	111-22-	26-Jul-79	862	Year - 2009	None	TaxesFiled4U	

	been a tax preparer for the past 7 years and currently have a PTIN. Your current PTIN is P00100192.	3342		Cinnamon Cir. Hershey, PA. 33681	Filing Status - Married filing jointly		1795 Almond Ln. Hershey, PA 33681	
Marsha Mellow	You have been a tax preparer for the past 7 years and currently have a PTIN. Your current PTIN is P00100020.	111-22- 3342	26-Jul-79	862 Cinnamon Cir. Hershey, PA. 33681	Year - 2009 Filing Status - Married filing jointly	None	TaxesFiled4U 1795 Almond Ln. Hershey, PA 33681	
Marsha Mellow	You have been a tax preparer for the past 7 years and currently have a PTIN. Your current PTIN is P00100068.	111-22- 3342	26-Jul-79	862 Cinnamon Cir. Hershey, PA. 33681	Year - 2009 Filing Status - Married filing jointly	None	TaxesFiled4U 1795 Almond Ln. Hershey, PA 33681	
Marsha Mellow	You have been a tax preparer for the past 7 years and currently have a PTIN. Your current PTIN is P00100168.	111-22- 3342	26-Jul-79	862 Cinnamon Cir. Hershey, PA. 33681	Year - 2009 Filing Status - Married filing jointly	None	TaxesFiled4U 1795 Almond Ln. Hershey, PA 33681	
Marsha Mellow	You have been a tax preparer for the past 7 years and currently have a PTIN. Your current PTIN is P00100176.	111-22- 3342	26-Jul-79	862 Cinnamon Cir. Hershey, PA. 33681	Year - 2009 Filing Status - Married filing jointly	None	TaxesFiled4U 1795 Almond Ln. Hershey, PA 33681	