

## Digital Delivery

### 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 focus group.
  - Remind participant to be honest and open and willing to share ideas and dislikes with the group/ team.
  - Remind that (s)he is helping us evaluate our digital services—we are not evaluating him/her.
7. Ask participants if they have any questions.
8. 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.
9. Have participant sign receipt form and record honorarium check number on signed form.

## Participant Consent Form

The purpose of this study is to help us evaluate the digital services offered or soon to be offered by IRS. 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.

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 to the extent allowed by law and any report of this research will not identify you personally in any way.

If you agree to help us, please sign below.

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*(Signature)*

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*(Date)*

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*(Print Name)*

### **Paperwork Reduction Act (PRA) Statement:**

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## Prompting Questions

1. What have been your prior experiences with using IRS.gov?
2. What services or tools do you use most on the site?
3. What services or tools would you like to see available on a mobile device or tablet?
4. How would you like to interact with the IRS?
5. If we were to create a special mobile application for tax professionals, what services would you like to see?
6. What transactions would you like to conduct?
7. If you have had a chance to look at and/or use the redesigned site what are your thoughts?