

IRS2GO v5 User Experience Study

Recruiting Script

Hello, I'm [NAME] from [COMPANY] on behalf of the Internal Revenue Service. The IRS wants to hear from taxpayers in order to provide better service. Today, we'd like to get feedback on our new mobile app called IRS2Go. What we would like to do is ask you a few questions to see if you qualify to participate in a 5 minute study about this mobile app. If you do qualify, we'd like to have you participate in the study now. We are very interested in getting taxpayers opinions on the functionality of our app. These evaluations will be used for research purposes only and any personal information you provide will not be used for anything other than this particular study. Are you willing to answer a few questions to see if you qualify?

If No, terminate session.

1. Do you own and use a mobile device like a smartphone or tablet?

- Yes
- No

If No, terminate session.

2. What kind of mobile device do you mainly use?

- Android smartphone or tablet (mobile Android device with applications and internet access, like a Samsung Galaxy S IV or Nexus 10)
- iOS smartphone or tablet (mobile iOS device with applications and internet access like an iPhone or iPad)
- Windows smartphone or tablet (mobile Windows device with applications and internet access like a Nokia Lumia)
- BlackBerry smartphone (BlackBerry device with applications and internet access)
- Regular mobile phone
- I don't know

If Blackberry, Windows, or regular mobile phone, terminate session

Paperwork Reduction Act 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 **1545-2256**. 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**

Consent Form

I agree to participate in the study conducted and recorded by the Internal Revenue Service (IRS). I understand that the study will take approximately 5 minutes.

I understand that participation in this usability study is voluntary and I agree to immediately raise any concerns or areas of discomfort during the session with the study administrator.

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Washington, DC 20224

Please sign below to indicate that you have read and you understand the information on this form and that any questions you might have about the session have been answered.

Date _____

Please print your name _____

Please sign your name _____

Thank you! We appreciate your participation.

Introduction

Thank you for participating today, I want to give you a little information about what you will be looking at and give you time to ask any questions you might have before we get started. Today we are asking you to evaluate our mobile app and complete a short task. Our goal is to find out how easy it is or how difficult it is for you to use the app.

I am here to record your reactions to and your comments about the app. I have a colleague helping me take notes and observe your interactions with the app as well.

During this session, I would like you to think aloud as you work to complete the tasks. I will not be able to offer any suggestions or hints, but from time to time, I may ask you to clarify what you have said or ask you for information on what you were looking for or what you expect to have happen.

Demonstrate how to think out loud.

Dummy Data

Where's my Refund

If your task prompts you to enter personal information, such as a social security number, please use the information provided below. **Do not enter your real information.**

SSN	Filing Status	Refund Amount
890-55-0042	Individual	\$ 2,323
890-55-0055	Individual	\$ 1,005
890-55-0001	Married-Filing Joint	\$ 2,828
890-55-0022	Married-Filing Joint	\$ 1,212
890-55-0027	Head of Household	\$ 1,111

Order A Transcript

If your task prompts you to enter personal information, such as a social security number, please use the information provided below. **Do not enter your real information.**

SSN	Date of Birth	Street Address	Zip Code
444-10-0000	01/25/1965	1101 New Hampshire Ave NW	20037
030-00-0701	01/01/1970	1101 New Hampshire Ave NW	20037

Usability Test

Study participants will be given a prototype for a single feature. Individual feature scripts are listed below.

Where's My Refund

1. Do you know how to get your tax refund status?
2. Is it easy to get your tax refund status?
3. In general, how can we make this better?

Free Tax Prep Provider Locator

1. Do you know how to find a free tax preparation provider?
2. Is it easy to find a free tax preparation provider?
3. In general, how can we make this better?

Contact IRS

1. Do you know how to contact the IRS?
2. Is it easy to contact the IRS?
3. In general, how can we make this better?

Make a Payment

1. Do you know how to make a payment to the IRS?
2. Is it easy to make a payment to the IRS?
3. In general, how can we make this better?

Request a Transcript of your Tax Records

1. Do you know how to request a transcript of your tax records?
2. Is it easy to request a transcript of your tax records?
3. In general, how can we make this better?

Optional Background Information Questions

Thank you for participating in this study. Are you willing to answer a few optional background questions?
If No, terminate session.

1. What is your gender?

- Male
- Female

2. What is your age range?

- 18-39
- 40-59
- 60-75
- 76+

3. What is your highest level of education?

- High School or less
- Some College
- College Degree
- Advanced Degree

4. What is your experience with smart phones?

- Less than 1 year
- 1-2 years
- 3+ years

5. How much time a day do you spend on your smart phone (using apps, checking email, surfing the web, etc)?

- Less than 1 hour
- 2-3 hours
- 4-5 hours
- 6+ hours