

TEST DATES: February 2019

IRS

Interview Guide - IRS.gov SWAT Customer Needs

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Introduction & Background

Hi, my name is Heather from Mediabarn.

Thank you very much for your time. Today we're going to be talking about your business taxes.

As you may have guessed, the sponsor of this study is the IRS. IRS has hired Mediabarn as independent researchers on this project in the hopes that you may feel comfortable talking with me about your feelings and opinions of the things we'll be discussing today.

The primary outcome of the findings from this research will hopefully lead to improvements to the IRS website.

Do you have any questions before we get started?

Pre-Test Questions

Before we begin, tell me about yourself.

- In what industry do you work?
- What is your job role?

- What does a typical day look like?

- Describe your career path. How did you end up where you are today?

- We're going to be spending our time today mainly talking about your business taxes... Realistically, how much of the year do you spend thinking about that?
 - What prompts you to think about your taxes?

Motivations

Income

- At what point in the year do you think about paying taxes on your business income?

Tax Return / File

- How complex do you think your business taxes are?
 - What makes your business tax situation complex / simple?
- How do you file your business tax return? (Do you file taxes by yourself? Hire an accountant?)
 - Do you use any software or other tools to help you?
 - How did you decide whether to do your taxes on your own vs. hire a tax professional? What were the key reasons for your choice?
- How confident do you feel **when completing your tax return**?
- How important is it to you to file your taxes on time or early?

Tax Payments

- How important is to you to NOT owe a balance to the IRS?

- How important is it to you that you receive a refund once you file your business tax return?
- Some people purposely overpay their taxes in order to get a refund; others purposely underpay so they feel they're not loaning money to the government. How do you feel about over- or underpaying your business taxes throughout the year?
- How do you pay your business taxes now?
 - Do you make quarterly tax payments to the IRS?

Journey

- At what point in the year do you first start thinking about **filing your business tax return**?
- What do you do in order to file your annual tax return? What are the steps you need to complete?
- What documents or forms do you need to file business taxes?
- What information or resources do you need when you file your business tax return?
- What is the one word you would use to describe how you feel **when filing your business tax return**?
- What aspects about **filing your business tax return** are stressful, upsetting, or disturbing to you?

- o Of all the things you've just listed, what is the worst part for you?
- Walk me through your experience paying business taxes.
- What do you do in order to pay your business taxes? What are the steps you need to complete?
- What information or resources do you need when you make tax payments?
- What is the one word you would use to describe how you feel **when making business tax payments**?
- What aspects about **making business tax payments** are stressful, upsetting, or disturbing to you?
- o Of all the things you've just listed, what is the worst part for you?

Resources

Information Sources

- Where do you go to get answers to tax questions or concerns?
- How do you typically interact with the IRS?
- o Where are you physically when you interact with the IRS?

- o Technically, how do you interact with the IRS? (phone, laptop, mobile, etc.)
- o Do you rely on others (not just tax professionals) to help you with the IRS?
- o Have you ever been contacted by the IRS? How? For what purpose?
- o As a business owner, what would be the most convenient way for you to interact with the IRS?
- In the last 12 months, approximately how many times have you visited IRS.gov?
 - o What were you trying to accomplish?
 - o Is there a particular section of the website or piece of information that you recall having visited?
 - o Were you able to find what you needed?
 - o **If never visited:** Is there a particular reason that you have NOT gone to the IRS website?

Desired IRS.gov Experience

- What would you like to be able to do on IRS.gov?
- If you had a magic wand and could change (or include) just one thing on the IRS website, what would it be and why?

Summary Quotes

- What are the most important things to you when you think about:
 - Paying taxes on your business income?

 - Filing your business tax return?

- Could you summarize what your goals are when thinking about your business taxes?

- In thinking about the website for IRS, what matters most to you?

Wrap-Up

- Do you have any other thoughts or comments you would like to share before we finish?