



# TDC-ON RESEARCH PLAN

## TAXPAYER DIGITAL NOTIFICATIONS – OUTBOUND NOTICES

OLS UXD Researchers from Booz Allen Hamilton will conduct qualitative and quantitative research to obtain taxpayer feedback on approved features and functionality for the Taxpayer Digital Notifications Outbound Notices (TDC-ON) MVP application, which will integrate and be housed within Online Account. In an effort to build upon prior TDC-ON research efforts and validate the defined requirements, research will be broken into two tracks which will include understanding the needs of the target audience, concept terminology, and overall perceived usefulness of the application, as well as usability testing using static low-fidelity wireframes and/or interactive high-fidelity prototypes. Insights gathered aims to assist TDC-ON product owners and stakeholders to identify areas of opportunity on both the design and functional aspects of the application so that it is easy to use for all taxpayers.

### RESEARCH GOALS

The goal of TDC-ON MVP is to improve the individual taxpayer experience of receiving communications from the IRS. Currently, the IRS communicates with taxpayers almost solely by physical mail; the MVP will attempt to ensure that taxpayers are able to easily and securely receive notices via physical mailings and digitally through a secure environment built into Online Account. The long-term vision of TDC-ON aims to allow taxpayers the capability to “opt into” digital-only communications if a digital channel is their preferred method of receiving communications, thereby eliminating the need for physical letters. As a result, this will significantly decrease the number of noticed mailed and will save the agency a significant amount of money on printing, mailing and postage costs.

The current goal is to understand how taxpayers envision receiving digital notices and communications from the IRS through a secure environment. As a result, research will be broken up into two tracks.

**Research Track One:** Focuses on validating if taxpayers who are able to authenticate and log into Online Account would use a digital document repository of IRS notices. This will be conducted both quantitatively via an online survey link posted to IRS.gov and qualitatively via an online usability testing platform.

**Research Track Two:** Focuses on evaluating the TDC-ON application itself by ensuring that wireframes, prototypes, and final applications are understandable, usable, and useful to taxpayers.

### RESEARCH OBJECTIVES

1. Understand the mindset of taxpayers who want new ways to interact with the IRS and uncover what would motivate them to use some methods or tools over others.
2. Evaluate existing terminology used to describe the notices and ensure that they are understandable.
3. Evaluate how taxpayers would use and/or interact with the new digital inbox within Online Account.
4. Ensure that the eventual wireframes, prototypes, and applications are understandable, usable, and useful.

## TARGET AUDIENCE & QUALIFICATION CRITERIA

This research study targets individual taxpayers that have received notices from the IRS in the past and are familiar with Online Account.

Participants must be individual taxpayers who:

- Are at least 18 years old
- Have filed taxes within the past 5 years
- Does their own taxes (i.e., a family member or a tax professional does not do it for them)  
OR
- Has a tax professional help them file their taxes (i.e. CPA, enrolled agent, family member, etc.)

In addition, participants should:

- Have received notices in the mail from the IRS within the past five years AND
- Be familiar with Online Account

## ESTIMATED BURDEN & COMPENSATION

Within Research Track One, data will be collected through a survey via SurveyMonkey. The link to the survey is anticipated to display within the promotions box in Online Account and on various pages on IRS.gov. Soliciting taxpayer feedback through IRS.gov and IRS applications like Online Account helps to ensure that the target population is recruited; however, to ensure statistically significant results, the survey should remain posted for at least three full weeks and/or until a minimum of 400 quality responses has been collected. Note: This number could change once the team collaborates with the business to identify survey questions and focus areas. Once live, the UXD Research Team will monitor the survey to see how many respondents have participated and as appropriate, clean the data set to certify quality responses. In addition, Personally Identifiable Information (PII) will neither be asked for nor gathered. Due to the number of needed participants, the survey will need to obtain OMB PRA approval.

Depending on the total number of the questions and overall survey complexity, the survey could take anywhere from five to fifteen minutes to complete. The survey will close once a minimum of 400 quality responses has been collected. Based on previous surveys posted to IRS.gov, approximately 300-400 participants may get screened out at the beginning of the survey.

Within Research Track Two, participants will be recruited to complete a remote unmoderated usability testing session through an online platform, Validately, via a link at the end of the quantitative survey from Research Track One. Participants will be told ahead of time that providing additional feedback will take up to twenty minutes and is completely optional, so only taxpayers who are willing and able are anticipated to participate. Similar to the quantitative survey, Personally Identifiable Information (PII) will neither be asked nor gathered.

Compensation will not be provided for either research track.

## RESEARCH METHODOLOGY

### Research Track One: Quantitative Survey

The quantitative survey will be used to obtain statistically significant information from at least 400 taxpayers. The survey is anticipated to be short, under 20 items, and will take respondents no more than fifteen minutes to complete.

### Research Track Two: Qualitative Usability Tests

Conducted remotely, unmoderated usability tests will be used to obtain qualitative information from current users of Online Account who may or may not be interested in TDC-ON. Each usability test session will take an additional ten to twenty minutes to complete and will be recorded. Recordings will be available to IRS stakeholders and product owners for reference, upon request.

## DELIVERABLES AND TIMELINE

This timeline is tentative and subject to change based on the UXD Research team's workload, OLS priority shifts, design timelines, and OMB PRA approval timelines.

DATES	ACTIVITY
Week of June 17	Create and finalize research plan with product team (deliverable)
Week of June 24	Create draft survey and distribute to team for feedback
Week of July 8	Finalize survey with product team and input into SurveyMonkey
Week of July 8*	Create draft unmoderated wireframe usability testing guide
Week of July 15*	Finalize unmoderated wireframe usability testing guide (deliverable)
Week of July 22*	Set-up unmoderated testing in Validately
Week of July 29*	Submit OMB PRA package to Jill MacNiece (deliverable)
Week of August 26**	Launch combined survey/unmoderated usability test
Week of Sept 23***	Write draft findings report
Week of Sept 30***	Finalize findings report (deliverable)

\*Contingent on design mockups being created and approved

\*\*Contingent on OMB PRA approval

\*\*\*Contingent on the length of time required to achieve desired respondent quantities

## PROJECT STAKEHOLDERS

- Kira Prin, User Experience & Design Specialist, IRS OLS
- David Lunsford, Product Owner, IRS OLS
- Amy Richard, User Experience & Design Specialist, IRS OLS

## UXD RESEARCH TEAM

- Jake Sauser, UX Research Lead, Booz Allen Hamilton – sauser\_jake@bah.com
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## 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**. This survey will take around 10 minutes to complete. All responses are confidential. If you have any comments regarding the time estimates associated with this study or suggestions on making this process simpler, please write to:

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