TTK

The questions used in each interview will need to be carefully documented and monitored for statistical purposes:

General:

1. Have you ever used this site or referred clients to this site?
2. What was the first impression when you entered the website?
3. Are the navigation titles clear to you as to what content you might find under them?
4. Are things on the site named as you would expect/want?
5. What improvements would help your clients (Preparers & Tax Professionals)?
6. How does this site compare to other tax sites you have used?
7. Is there anything on other sites that you would like to see on the Tax Toolkit?
8. When you have a tax question where do you start, I.E. phone call, web search, IRS.gov, Tax Toolkit, social media, tax professional?
9. Were any un-necessary steps taken to find what you were looking for?
10. Did you run into any issue that would make you leave our site?
11. Is there anything that distracts you or gets in your way when using this site?
12. Are there features you complete ignore?

Appearance:

1. What parts of the page are your eyes drawn to first?
2. How would you rate the visual aspect of the site? On a scale from 1-5, with 5 being the best and 1 being the worst.
3. Do you like where the search bar is located?
4. Is the font easy to read?
5. Do you like the color scheme?

Features (I.E. Search):

1. What are your thoughts on the Contact Us map showing office locations?
2. If you can't find what you are looking for, what do you do? I.E. make a phone call, search elsewhere, text a friend or ask a return preparer?
3. Are the articles being pulled relevant to what you searched for?
4. What is your preferred method of viewing articles / topics, alphabetical or by category?
5. What color font is preferred? I.E. White, Black, Purple, Green?

Interaction (Mobile Only):

1. On a scale of 1 to 5 (1 not confident at all, 5 very confident) how would you rate your level of confidence in using your mobile phone for searching technical issues?
2. What is your preferred viewing method, vertical or horizontal?
3. Do you change between vertical and horizontal when reading or scrolling on the page?
4. Is anything hard to select with your finger?
5. Can you read the font easily?
6. On a scale of 1 to 5 (1 being the least and 5 being best), how would you rate your mobile experience on the tax toolkit?

Overall Impression:

1. How would you describe your overall experience with this site?
2. What did you like the most about using this site?
3. What did you like the least about this site?
4. What, if anything, surprised you about your experience on this site?

5. What, if anything, caused you frustration on this site?

Roadmaps (High-Level Image Display Only)

Vision: To provide a simple way for Taxpayers to input their IRS notice/letter number or a keyword and get the following: Plain Language explanation of the notice/letter, Links to information or/and next steps, and where they are in the Taxpayer Journey.

Appearance of printed map:

1. What does this high-level image communicate to you? Are any emotions triggered that come to mind?
2. Do you find the image visually balanced?
3. Do you like the colors?
4. Is there enough white space/color contrast?
5. There is a high level of information on the page, do you feel it is easy to navigate to the topic you are looking for?
6. Once the tool is interactive and live, would you like to participate in testing?
7. We're thinking about calling it the "Taxpayer's Journey" or "Taxpayer's Roadmap". Would you recommend anything different?
8. To help us promote this tool, would you be willing to place a link to the tool from your site?
9. If available online, would you want to download this or save a copy?
10. If you could not save this, would you bookmark this page to return to it?
11. Would you like links to open a new window / tab or would you prefer that your current window be routed to the new destination?

Interaction with roadmap site once built:

1. What do you expect the biggest benefit would be?
    a. Synthesize complex data
    b. Visualize a process
    c. Understanding trends
2. Do you think this will be a useful web based interactive tool for you or someone you know?
3. When in a topic is it easy to navigate back to the home page of the Roadmap?
4. Are you able to clearly understand where you are in the process based on this roadmap?
5. Are there any topics that are not listed that you feel need further clarification of the process we can add to the roadmap?
6. Describe your feelings when interacting with this page. (Easy to interact, frustrating, too much information etc.)
7. Were any un-necessary steps taken to find what you were looking for?
8. Did you run into any issue that would make you leave our site?
9. Is there anything that distracts you or gets in your way when using this site?
10. Are there features you complete ignore?

Overall Impression:

1. How would you describe your overall experience with this site?
2. What did you like the most about using this site?
3. What did you like the least about this site?
4. What, if anything, surprised you about your experience on this site?
5. What, if anything, caused you frustration on this site?