

Request for Approval under the “Generic Clearance for the Collection of Routine Customer Feedback” (OMB Control Number: 1545-2274)

TITLE OF INFORMATION COLLECTION: Individual Online Account (OLA) Usability Testing

PURPOSE:

The IRS has launched a taxpayer online account where taxpayers can view information about their tax account and complete some tax-related actions. We will be asking for feedback on the tool and the users experience to provide feedback to the development team.

DESCRIPTION OF RESPONDENTS:

The respondents/participants in thee usability tests have an active online account and will be recruited through a third-party contractor. The IRS does not have a listing of all OLA holders and the recruitment is strictly handled by the contractor.

TYPE OF COLLECTION: (Check one)

- | | |
|--|---|
| <input type="checkbox"/> Customer Comment Card/Complaint Form | <input type="checkbox"/> Customer Satisfaction Survey |
| <input checked="" type="checkbox"/> Usability Testing (e.g., Website or Software | <input type="checkbox"/> Small Discussion Group |
| <input type="checkbox"/> Focus Group | <input type="checkbox"/> Other: _____ |

CERTIFICATION:

I certify the following to be true:

1. The collection is voluntary.
2. The collection is low-burden for respondents and low-cost for the Federal Government.
3. The collection is non-controversial and does not raise issues of concern to other federal agencies.
4. The results are not intended to be disseminated to the public.
5. Information gathered will not be used for the purpose of substantially informing influential policy decisions.
6. The collection is targeted to the solicitation of opinions from respondents who have experience with the program or may have experience with the program in the future.

Name: Ariel Wooten

To assist review, please provide answers to the following question:

Personally Identifiable Information:

1. Is personally identifiable information (PII) collected? Yes No
2. If Yes, will any information that is collected be included in records that are subject to the Privacy Act of 1974? Yes No
3. If Yes, has an up-to-date System of Records Notice (SORN) been published? Yes No

Gifts or Payments:

Is an incentive (e.g., money or reimbursement of expenses, token of appreciation) provided to participants? Yes No

Participants will be given \$100 as an incentive for this study. The incentive needs to be \$100 to compensate individuals for their time, because industry standards for in-person studies typically pay \$100 or more. In addition, we are asking individuals to complete steps prior to the actual in-person session, including setting up an Online Account, logging into their Online Account to ensure they can access it, and handling any log-in issues they encounter prior to the testing session.

BURDEN HOURS

Category of Respondent	No. of Respondents	Participation Time	Burden
Individual Participant Recruitment	80	20 min.	27 hours
Individual Participation in Sessions	80	60 min.	80 hours
Totals	80	80	107 hours

FEDERAL COST: The estimated annual cost to the Federal government is \$199,905

If you are conducting a focus group, survey, or plan to employ statistical methods, please provide answers to the following questions:

The selection of your targeted respondents

- Do you have a customer list or something similar that defines the universe of potential respondents and do you have a sampling plan for selecting from this universe?
 Yes No

If the answer is yes, please provide a description of both below (or attach the sampling plan)?

The contractor has a general panel that they use for recruiting purposes. The contractor will contact individuals on the panel and ask them questions about their experience with the IRS Online Account Tool using a screener. The contractor will recruit individuals who that either have an active Online Account or are willing to sign up for an Online Account prior to the testing session.

Administration of the Instrument

- How will you collect the information? (Check all that apply)
 - Web-based or other forms of Social Media
 - Telephone
 - In-person
 - Mail
 - Other, Explain

2. Will interviewers or facilitators be used? Yes No

Please make sure that all instruments, instructions, and scripts are submitted with the request.