



FORS | MARSH  
GROUP

## **Iterative Taxpayer Experience Testing for Online Account Release Wage and Investment Project Plan**

### **I. Study Points of Contact**

Fors Marsh Group and IRS points of contact

- i. IRS
  1. WI COR: Veronica Ogletree & Jeffery McConnell
  2. Research Study Leads: Ariel Wooten & Courtney Rasey
  3. Research Team Lead: Sasha Lanes
  
- ii. FMG
  1. Director of Qualitative Methods: Kinsey Gimble
  2. POC and Recruiting Lead: Julie Brown

### **II. Online Account Background and Research Objectives**

- a. Testing functionality and features of OLAs
- b. Testing rounds to be conducted based on rollout of OLA updates

### **III. Project Scope**

- a. 144-168 total (recruiting 20 to seat 12-14 per city, per round), 60 minute interviews, four cities, 3 rounds per city
  - i. Cities
    1. Atlanta, GA - Jackson Associates
    2. Memphis, TN - Axiom Research
    3. Columbus, OH - Lextant Labs
    4. Phoenix, AZ - Plaza Research
  - ii. Target population
    1. Individuals must be 18 years of age or older
    2. Mix of age and income
    3. Individuals must have filed taxes within the last 4 years
    4. Individuals must have made a payment to the IRS within the last 4 years
    5. Individuals must have an OLA or are willing to set up an OLA to participate in the study
    6. Up to 50% of participants can be from previous rounds of OLA study - capping participation at 2 rounds only
    7. Can use individuals that do not have access to their account, but attempted to access, so long as they provide us with information as to why they were unable to get into an account.

8. Population might change if transcript request become a focal point in the OLA updates
  9. Atlanta location – Can use participants from IRS Rapid Response study that took place in 2017/2018, but participants can have participated in one round only and cannot be used in additional OLA rounds (capping total participation at 2 rounds between both studies)
- iii. Screening materials & consent form
    1. Provided by IRS to FMG
  - iv. Facility rental and coordination
    1. Two IRS researchers conducting interviews at each location
    2. Two room rental over a day and a half to conduct interviews
    3. FMG to send IRS recruitment on T/Th each week during recruitment
    4. Will need audio recording at each location
      - a. Per contract “Audio recording of the sessions is also required.”
    5. Will require participants to sign consent form prior to participation

#### **IV. Project Timeline**

- a. Anticipated update release dates & fielding dates
  - i. Round 1
    1. Update release April 8<sup>th</sup> – April 12<sup>th</sup>
      - a. Fielding weeks of April 15<sup>th</sup> & April 22<sup>nd</sup>
  - ii. Round 2
    1. Update release June 10<sup>th</sup> – June 14<sup>th</sup>
      - a. Fielding weeks of June 24<sup>th</sup>, July 8<sup>th</sup>/15<sup>th</sup>
  - iii. Round 3
    1. Update release August 12<sup>th</sup> – 16<sup>th</sup>
      - a. Fielding end of August/beginning of September