

**Online Services
Supporting Statement
Approval Request for Generic Clearance for the Collection of
Qualitative Feedback on Agency Service Delivery
OMB #1545-2256**

Internal Revenue Service - Online Services: Customer Project Plan

Nationwide Tax Forums

1. Project Information

- a. **Project Name:** Nationwide Tax Forum Online Services Feedback
 - b. **Project Number:** 1545-2256
 - c. **Project Customer:** Online Services (OLS)
 - d. **Project Overview:** The purpose of this research from an operational value perspective, the purpose of this research is to collect information directly from tax professionals in order to assess usability, comprehension and sentiment of OLS products. From a taxpayer value perspective, the purpose of this study is to ensure that OLS products are designed to best meet the needs of tax professionals and the taxpayers they serve. OLS will use the data from this study to make updates to OLS products and services.
 - e. **Estimated Start Date:** July 2019
 - f. **Estimated End Date:** September 2019
-

2. Background

As outlined in the Internal Revenue Service (IRS) Strategic Plan, the Agency is working towards delivering high quality service to reduce taxpayer burden and encourage voluntary compliance. Consequently, the IRS seeks to develop a Future State of IRS service delivery that provides the most convenient and efficient service to taxpayers utilizing technologies, optimizing service channels, and partnering with third parties to assist taxpayers based on their need and preferences.

Online Services (OLS) hosted activities at the 2017 Tax Forums to provide information to tax professionals and conduct research on newly developed products. Activities included a Future State seminar, IRS.gov research, product demonstrations, and Future State focus groups. OLS used the research results in redesigning the tax professional landing page and designing tax professional digital services.

At this year's Tax Forums, OLS seeks to collect information from tax professionals about the newly developed online chat feature, IRS Online Account Multi-Page View and upgrades to the current IRS digital communication tools. OLS will conduct interview sessions with individual tax professionals and collect quick hit feedback at each Tax

Forum to market newly released products and identify potential problem areas with the products under development.

3. Research Goals/Objectives

- a. **Objective 1:** Collect and understand relevant and related data available within the IRS on digital communication methods.
- b. **Objective 2:** Collect and understand relevant comparative industry and service data.
- c. **Objective 3:** Identify user needs around digital notifications; secure messaging & chat.
- d. **Objective 4:** Facilitate product overviews with tax professionals to increase awareness and educate the audience on the latest Online Services updates.

4. Research Questions

- a. **Research Question 1:** How do taxpayers prefer to interact with their tax preparers and the IRS before, during and after filing season?
- b. **Research Question 2:** What is taxpayer and tax preparer sentiment around digital communication tools?
- c. **Research Question 3:** Are the products intuitive and easy to use?
- d. **Research Question 4:** Are the yearly improvements in IRS online tools increasing tax professionals confidence in the Agency?

5. Methodology

a. Type of Testing

- Comprehension: This type of testing evaluates participants' understanding of the communication goals of the notice or product.
- Usability: This type of testing evaluates participants' ability to use a product or service.

b. Participants:

The estimated time for each feedback entry is 2 minutes. Based on the number of collections from 2017, the number of burden hours for feedback is 27 hours (800 participants x 2 min / 60 min). The estimated time for each interview session is 30 minutes. OLS will conduct 120 sessions with tax professionals. Based on an estimated response rate of 50%, the IRS will attempt to recruit approximately 240 tax professionals. The burden hours for soliciting participation is 20 hours (240 potential participants x 5 min / 60 min) and the burden hours for completing the interview sessions is 60 hours (120 participants x 30 min / 60 min). The total number of burden hours requested is 120 hours.

| Collection Activity | Minutes Per Person | Number of Participants | Total Hours |
|--------------------------------------|---------------------------|-------------------------------|--------------------|
| Collecting feedback from booth demos | 2 minutes | 800 | 27 |
| Soliciting participants | 5 minutes | 240 | 20 |
| Interview session completion | 30 minutes | 120 | 60 |
| TOTAL HOURS | | | 107 hours |

- i. **Total Number of Participants:** 120
- ii. **Demographic Data Recorded:** Yes
- iii. **Additional Participant Criteria (Project Specific):** Recruited population will consist of tax professionals that have opted in to attending the Nationwide Tax Forums.
- iv. **Participant Recruitment Strategy:** Participants will be recruited from attendees of the IRS Nationwide Tax Forums. Individuals will have various backgrounds in tax preparation services. Interviews will be conducted with the following audience segments:
 - **Tax professionals**
 - Has filed returns for clients within the past 3 years
 - At least 18 years of age
 - Optional: Has prepared and filed taxes on behalf of client's that use an IRS Online Account
- v. **Data Sources Utilized for Recruitment (if none indicate n/a):** N/A
- vi. **Participant Honorarium:** No honorarium will be provided to research participants.

c. Overview of Testing Methodology:

The interview sessions will be limited to 30 minutes in length, and the session topic will be clearly communicated to potential participants in order to maximize participation. Participants will be assured anonymity of their responses, thus being free to express their thoughts and opinions. During each session, an OLS researcher will ask participants questions while he/she accesses a computer with a prototype of either IRS Digital Communication Tools or Power of Attorney Secure Messaging Portal. Depending on which prototype the participant is assigned during the testing session, OLS will use one of the two attached moderator's guides for the session. Half of the interview sessions will focus on either IRS Digital Communication Tools and the other half will focus on Power of Attorney Secure Messaging Portal. An additional OLS or other IRS employee will serve as a note taker/scribe for the sessions. For the IRS Booth feedback collection, participants will be given a link to provide feedback on the IRS product demo they will have just viewed. Attendees are there of their own accord and will choose to opt in or not.

Total Testing Sessions: 120

d. Advantages and Limitations:

- i. **Sample Size:** Due to the total number of participants being tested (120), testing results may not reflect the opinions and attitudes of all taxpayers.
- ii. **Qualitative Data:** Usability testing and qualitative informational sessions will provide data that is typically descriptive in nature and testing results may not reflect the opinions and attitudes of all taxpayers and tax professionals.

- e. **How the data will be utilized:** The data collected in this project will aid in the possible development of an OLA filing security feature that will assist in reducing the number of fraudulent returns and protect taxpayers from identify filing fraud.

6. Staffing Point(s) of Contact

a. Customer Point of Contact

- i. **Name:** Nicol Collins
- ii. **Email:** Nicol.j.collins@irs.gov
- iii. **Phone Number:** 240-613-5912

b. OLS Project Point of Contact

- i. **Name:** Marisa McDaniels
- ii. **Email:** marisa.mcdaniels@irs.gov
- iii. **Phone Number:** 470-639-3120

7. Project Timeline

| Milestone | Responsible Function | Testing Start Date | Estimated Due Date |
|------------------------------|----------------------|-----------------------------------|-----------------------------------|
| Project Kick-off Meeting | OLS | July 1 st , 2019 | July 1 st , 2019 |
| National Harbor Tax Forum | OLS | July 8 th , 2019 | July 11 th , 2019 |
| Chicago Tax Forum | OLS | July 22 nd , 2019 | July 25 th , 2019 |
| New Orleans Tax Forum | OLS | August 5 th , 2019 | August 8 th , 2019 |
| Orlando Tax Forum | OLS | August 12 th , 2019 | August 15 th , 2019 |
| San Diego Tax Forum | OLS | September 16 th , 2019 | September 19 th , 2019 |
| Preliminary Analysis Results | OLS | July 12 th , 2019 | September 20 th , 2019 |
| Final Analysis Results | OLS | October 1 st , 2019 | November 1 st , 2019 |