

## Introduction

The Taxpayer Advocate Service (TAS) wants to obtain feedback about the ease of using its website and what improvements could be made to improve your experience. Specifically, we would also like to obtain your feedback about our home page, navigation and search features, help topics, notices, a roadmap of the taxpayer journey, as well as other resources available on our website.

## Purpose Statement

TAS values your opinion and wants to gather your thoughts and perceptions concerning the layout design, and usability of the TAS website. Our discussion today will last no more than 60 minutes, and we will explore your thoughts and experiences while testing the TAS website.

## Ground Rules

Let's go over some ground rules:

- We will ask you to review the sections of the website and ask for your overall impressions and satisfaction with the look and organization of the materials provide. We will also ask you to explain your reactions to the various section of the TAS website, your satisfaction with those sections, and other comments you may have. **There are no right or wrong answers.** Everyone's opinion is valuable. We want to obtain your impressions about the look of our website as well as how easy or difficult it is to accomplish various tasks using the information provided. Please note when you find yourself having any difficulties with a task and state your preferences regarding what would facilitate your accomplishment of the task. To ensure that we accurately capture your reactions and comments as you work through the various user testing questions, we will record your user experience. Your experiences will be combined with other experiences of several other users to identify needed changes to the TAS website. TAS's goal is to provide the best website experience possible for its users.
- This user test will last about 60 minutes
- Please speak loudly and clearly, so we accurately capture your thoughts and opinions about each section.
- As mentioned, we will be **recording this session**, to ensure that we capture your comments and reactions. We are conducting user tests with several other participants. We will write a report summarizing the reactions, comments and satisfaction levels of each section tested. The recordings will be used to refresh our memories and to make sure that we accurately present your ideas and opinions in the report. **(No names or organizations will be identified in the report.)** Once the report is written, the recordings are destroyed.

- There will be **no formal break**; however, if you need to stretch, go to the restroom, or walk around a little, please feel free to do so but please come back quickly. Your comments are very important to us.
- Please **silence any cell phones** and/or other devices.
- One last item,

The Paperwork Reduction Act requires that the IRS display an OMB control number on all public information requests. The OMB Control Number for this user study is 1545-1349. Participation in this user study is voluntary, and we estimate the length of the session will be 60 minutes. If you have any comments regarding the time estimates associated with this study or suggestions on making this process simpler, please write to:

Internal Revenue Service  
Special Services Section  
SE:W:CAR:MP:T:M:S – Room 6129  
1111Constitution Ave. NW  
Washington, DC 20224

### **Specific Instructions**

- Thanks for helping Userlytics make the world more user-friendly!
- After reading each task/instruction, please click on "Hide tasks" so that your screen is not hidden by these drop-down instructions.
- Press the green "Start" icon in the upper left of this box to start the test.

## **Audience Research Questions**

### **First Impression/Homepage**

1. As you explore and perform tasks, speak aloud and explain what you are doing. If you feel stuck or unsure about how to proceed, it's okay to say so.
2. Explore the homepage of the site. Give us your reactions as you scroll down the page. What do you think of the content featured here? What would you most likely click on?
3. Looking at the homepage, what do you think this organization does? What services do they provide? Talk about your likes and dislikes about the design of the page. Does it provide enough information for you?
4. Based on the homepage, how likely are you to explore more?

- Very unlikely
- Unlikely
- Neither likely nor unlikely
- Likely
- Very likely

### **Navigation**

5. Explore the navigation menu. Review all the links at the top of the page (e.g., Get Help, Resources for Taxpayers). Are these the links you expected to see? Feel free to tap the links to see the dropdown menus and talk out loud about the links that are available.
6. How satisfied are you with how the navigation is organized?

- Very unsatisfied
- Unsatisfied
- Neither unsatisfied nor satisfied
- Satisfied
- Very satisfied

### **Sitewide Search**

7. Find the search field and search for a topic you are interested in. As you type your search term in the field, talk out loud about the popular search terms and the quick results that show up.
8. Go ahead and type a search term and hit enter/return to view all results. Scroll down the page and discuss the results showing up based on your search term. Are you able to easily find what you are looking for?
9. Feel free to search for more than one term. Use the filters to narrow down your results. How helpful are the options to narrow down your results? Are the options clear? What do you think of the information showing with each search result on the page?
10. How satisfied are you with the search tool and the results you are getting?

- Very unsatisfied
- Unsatisfied
- Neither unsatisfied nor satisfied
- Satisfied
- Very satisfied

## **Get Help Topics**

11. If you wanted to find answers about filing a tax return, where would you go on the site? Talk out loud as you explore and navigate the site.

12. If you haven't already, click 'Get Help' in the nav, and then 'View all help'. Scroll down the page and review the information provided. Is this the information you expected to see here? Is anything missing? What do you think of the way information is displayed?

13. Select a topic that is relevant to you (e.g., Paying Taxes, Issues & Errors). Review the content on this page and talk out loud about the featured help pages. Click one of the help pages for your selected topic.

14. Scroll down the help page you selected and explore all the sections of content. Is the content here what you expected? What do you like or dislike about the information? Explore more than one help page.

15. How helpful are these pages in providing information and answers about tax issues?

- Not at all helpful
- Slightly helpful
- Somewhat helpful
- Very helpful
- Extremely helpful

## **IRS Notice Look-up**

16. Next, where would you go if you received a letter from the IRS and wanted more information about it? Talk out loud as you explore and navigate the site.

17. If you haven't already, click on 'Get help' in the navigation and then 'Look-up your notice'. Scroll down the page and review the information. If you had an IRS notice (e.g., CP 75, CP 12, Notice of Intent to Levy), does this give you enough information to start finding answers?

18. Go ahead and click on a notice category (e.g., Collection). Scroll down the page and explore some of the expanded view of listings. Feel free to use the filters and search. What do you think of the way information is displayed on the page?

19. Select any notice in the list and click through to 'See notice details'. Scroll down the page and discuss the content that's included here. What information is most important to you? What do you want to immediately understand? Feel free to review more than one notice.

20. How satisfied are you with the notice look-up and information provided here?

- Very unsatisfied
- Unsatisfied
- Neither unsatisfied nor satisfied
- Satisfied
- Very satisfied

## **Taxpayer Roadmap**

21. Next let's explore a different way of getting information about an IRS notice. Click 'Get Help' in the nav, and then the link for the 'TAS Digital Roadmap'. Search for a specific notice or jump or view by map section to explore the roadmap.

22. Feel free to interact with different areas of the map, zoom in/out, review the map key, and click on 'stations' to explore more information about notices. What do you think of this map? Is the information clear? Do you understand how the map works? Why or why not?

23. How helpful is the TAS Digital Roadmap in providing information about receiving a notice from the IRS?

- Not at all helpful
- Slightly helpful
- Somewhat helpful
- Very helpful
- Extremely helpful

### **Resources for Taxpayers**

24. Close the roadmap view and use the navigation to click through to 'View all resources for taxpayers'. Scroll down the page and give us your initial reactions to the content and services featured on the page. Is this the content you expected to find here? What is most interesting to you?

25. Using the navigation, click on the taxpayer resource to 'use our qualifier tool' to determine if you can ask for assistance. Scroll down the page and answer the qualifying questions—feel free to try different options to see the outcomes. What do you think of this quiz? Is the information clear and easy to understand?

26. How satisfied are you with the resources for taxpayers and the qualifying tool?

- Very unsatisfied
- Unsatisfied
- Neither unsatisfied nor satisfied
- Satisfied
- Very satisfied

### **Tax News & Information**

27. In the nav, click on 'Tax News & Information'. Scroll down the page and give us your impressions of the news and articles that are featured. Feel free to use the filters to explore news topics. What content interests you?

28. Go ahead and click through to one or more news articles. Would you read these articles? What do you like or not like about this kind of information? Do you like the design of these pages?

29. Based on what you've seen in the 'Tax News & Information', how likely are you to return to this site just for this tax-related news content?

- Very unlikely
- Unlikely
- Neither likely nor unlikely
- Likely
- Very likely

### **Contact Us**

30. If you wanted to contact the Taxpayer Advocacy Service for help, where would you go? Talk out loud as you navigate the site.

31. If you haven't already click 'Contact us' in the nav. Scroll down the page and give us your impressions of the organization and content of this page. Feel free to expand content and look-up TAS offices in your state.

32. Click on the link to 'submit a request for assistance'. What do you think of this page and the requirements for the 'Form 911'? Are the instructions clear? Is this process what you expected?

33. How helpful are the tools and information within 'Contact us'?

- Not at all helpful
- Slightly helpful
- Somewhat helpful
- Very helpful
- Extremely helpful

### **About Us**

34. If you wanted to understand more about the Taxpayer Advocacy Service, where would you go? Talk out loud as you navigate the site.

35. If you haven't already, scroll towards the bottom of any page and click on 'Who we are' and review the entire page. What information do you want to immediately know about this organization? Is this what you expected to see here? Feel free to click through to learn more about their history, leadership, or reports to Congress. Is this information useful?

36. Look at some of the 'Success stories' featured here. Click through to look at one or two of the stories. What do you think of this content? Is this content you would read? Why or why not?

37. Next, find the link to the 'Taxpayer Bill of Rights'. Give us your impression of the ten rights featured on this page. Were you familiar with these rights?

38. Discuss out loud and then indicate your level of agreement with the following statement: The Taxpayer Advocate Service will help me if I have a tax problem that I can't resolve on my own.

- Strongly disagree
- Disagree
- Neither agree nor disagree
- Agree
- Strongly agree

### **Overall Impression**

39. What is your overall impression of this website? Discuss if the site provides enough information about the services provided, and if you would use it as a resource to get help for tax related issues.

40. How likely are you to visit this website?

- Very unlikely
- Unlikely
- Neither likely nor unlikely
- Likely
- Very likely

41. How likely are you to recommend the Tax Advocate Service website to a family member, friend, or colleague?

### **Outro text:**

- Thank you! Please click on "Submit" and then wait for the results to be fully uploaded. (The Userlytics Recorder will close automatically 5 seconds after the upload has been completed)

- We appreciate your help in making the world more user friendly!
- Post upload text: our User Experience Test Results have been received, thank you!