INTERNAL REVENUE SERVICE **OMB Control Number: 1545-2256**

INSTRUMENT 03

Individual and Household Digital Task and Navigation Activity

Service or experience: *[INSERT EXACT IRS DIGITAL SERVICE, PAGE, PROTOTYPE, OR EXPERIENCE]*

Fielding dates: *[MM/DD/YYYY – MM/DD/YYYY]*

Thank you for sharing feedback about an IRS digital experience. This voluntary activity should take about 25 minutes. You may skip any question or stop at any time, and your decision will not affect your taxes or access to IRS services. You will complete two tasks using an IRS webpage, prototype, or test environment. Use only the sample information provided and do not sign in to an actual account. The activity does not ask for your name. If contact information is needed for recruitment or an incentive, it will be collected separately. Results will be reported only in summary form or without identifying you.

Important: Do not include names; SSNs, TINs, or EINs; passwords or verification codes; contact information; account, card, notice, or case numbers; or other specific tax-account information.

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Context questions

Programming notes appear in gray italics and are not shown to respondents.

Q1. During the past 12 months, which of these tasks did you try to complete online? *Select all that apply.*

- ☐ Check a return, refund, amended return, or verification status
- ☐ View a balance, make a payment, or manage a payment plan
- ☐ Understand or respond to an IRS notice or unresolved issue
- ☐ View or request a transcript, record, or tax document
- ☐ None of these
- ☐ Not sure

Q2. How familiar are you with the IRS service, page, or task shown in this activity?

- ☐ Very familiar
- ☐ Somewhat familiar
- ☐ A little familiar
- ☐ Not at all familiar
- ☐ I have not used it before

Assign each respondent two scenarios from the table below. Randomize the order and save the assigned scenario and display order. Use only scenarios supported by the approved page, prototype, or test environment.

Fixed task-scenario set

Code	Scenario	Exact task wording
A	**Return or refund status**	Imagine that you filed an individual federal tax return and want to see whether the return or refund is still being processed. Starting on the page shown, find where you would go.
B	**Balance or payment**	Imagine that you need to view what you owe and make a federal tax payment. Starting on the page shown, find where you would go.
C	**Notice or unresolved issue**	Imagine that you received an IRS notice and want to understand what it means and what you should do next. Starting on the page shown, find where you would go.
D	**Transcript or record**	Imagine that you need a tax transcript or another IRS record. Starting on the page shown, find where you would go.

Task 1 questions

Assigned Task 1: [INSERT THE ASSIGNED SCENARIO WORDING FROM THE FIXED SET]

T1-1. Starting on the page or screen shown, select the first place you would click or tap.

The platform records the first click or tap and the display order. Do not ask respondents to sign in or enter actual account information.

T1-2. Were you able to find the information or action you expected?

- ☐ Yes
- ☐ Partly

☐ No
☐ Not sure

T1-3. What would you do next?
☐ Continue using the page or screen shown
☐ Go back or try another page or menu
☐ Use another IRS website, account, app, or tool
☐ Call the IRS
☐ Seek help from another person
☐ Stop and try again later
☐ Another action
☐ Not sure

T1-4. How easy or difficult was this task?
☐ Very easy
☐ Easy
☐ Neither easy nor difficult
☐ Difficult
☐ Very difficult

T1-5. How confident are you that you chose the correct path?
☐ Very confident
☐ Somewhat confident
☐ Neither confident nor unconfident
☐ Not very confident
☐ Not at all confident

T1-6. What made this task difficult, if anything? *Select all that apply.*
☐ The label or link I expected was missing
☐ The labels or choices were unclear
☐ There were too many choices
☐ The page layout or visual emphasis was confusing
☐ The content or instructions were unclear
☐ A link or control did not work
☐ An accessibility or assistive-technology barrier affected the task
☐ Another reason
☐ Nothing made it difficult

Task 2 questions

Assigned Task 2: [INSERT THE ASSIGNED SCENARIO WORDING FROM THE FIXED SET]

T2-1. Starting on the page or screen shown, select the first place you would click or tap.
The platform records the first click or tap and the display order. Do not ask respondents to sign in or enter actual account information.

T2-2. Were you able to find the information or action you expected?
☐ Yes
☐ Partly
☐ No
☐ Not sure

T2-3. What would you do next?
☐ Continue using the page or screen shown
☐ Go back or try another page or menu
☐ Use another IRS website, account, app, or tool
☐ Call the IRS
☐ Seek help from another person
☐ Stop and try again later
☐ Another action
☐ Not sure

T2-4. How easy or difficult was this task?
☐ Very easy
☐ Easy
☐ Neither easy nor difficult
☐ Difficult
☐ Very difficult

T2-5. How confident are you that you chose the correct path?
☐ Very confident
☐ Somewhat confident
☐ Neither confident nor unconfident

☐ Not very confident
☐ Not at all confident

T2-6. What made this task difficult, if anything? *Select all that apply.*

☐ The label or link I expected was missing
☐ The labels or choices were unclear
☐ There were too many choices
☐ The page layout or visual emphasis was confusing
☐ The content or instructions were unclear
☐ A link or control did not work
☐ An accessibility or assistive-technology barrier affected the task
☐ Another reason
☐ Nothing made it difficult

Closing questions

Q3. Where would you have expected to find any missing information or feature?

☐ On the IRS.gov home page
☐ On the signed-in account home page
☐ In the main navigation or menu
☐ In search results
☐ Under notices or messages
☐ Under payments or balances
☐ Under records or documents
☐ Under help or contact options
☐ Another location
☐ Nothing was missing
☐ Not sure

Q4. Which device did you use for this activity?

☐ Windows desktop or laptop
☐ Mac desktop or laptop
☐ Chromebook
☐ iPhone
☐ Android phone
☐ Tablet
☐ Another device

Q5. Did you use any of the following while completing the activity? *Select all that apply.*

☐ Screen reader
☐ Screen magnification, enlarged text, or high-contrast settings
☐ Keyboard without a mouse or touch input
☐ Voice control, speech recognition, switch access, or another input method
☐ Captions, transcripts, sign language, or text-based communication
☐ Reading, memory, attention, or other cognitive supports
☐ None of these
☐ Prefer not to answer

Before you answer: Do not include names, identifiers, or specific tax-account details.

Q6. What is the one most important change that would make these tasks easier? Please identify the label, page, step, or navigation choice.

Open-text response (up to 1,000 characters)