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

INSTRUMENT 04

Business and Tax Professional 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, business name, firm name, or client names. 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. Which option best describes your role for this activity?

- ☐ Business owner, sole proprietor, partner, shareholder, or member
- ☐ Officer or other person responsible for a business or organization
- ☐ Employee involved in finance, accounting, payroll, or tax work
- ☐ Employee or designated user with assigned online-account access
- ☐ Certified Public Accountant, Enrolled Agent, attorney, or other credentialed tax professional
- ☐ Return preparer or professional with limited representation authority
- ☐ Firm owner, partner, manager, or administrator
- ☐ Firm staff member, delegate, or support employee
- ☐ VITA/TCE or other community tax-assistance volunteer
- ☐ Another business or tax-professional role
- ☐ Prefer not to answer

Q2. Which workflows are part of your current work? *Select all that apply.*

- ☐ Business balances, payments, payment plans, or estimated taxes
- ☐ Business forms, returns, notices, records, or unresolved issues
- ☐ Business-account access, roles, approvals, or assigned users
- ☐ Power of Attorney, Tax Information Authorization, representation, or client information access
- ☐ Work across several businesses, entities, or clients
- ☐ Public IRS forms, guidance, or professional service entry points
- ☐ Another business or tax-professional workflow
- ☐ Not sure

Assign each respondent two eligible task scenarios from the set below. Business users may receive A, B, or C. Tax professionals and firm staff may receive B or D. Respondents with more than one role may receive any two relevant scenarios. Store the assigned scenarios and display order.

Fixed task-scenario set

Code	Scenario	Exact task wording
A	**Business balance and payment**	Imagine that you need to view the balance and recent payments for a business you are authorized to act for. Starting on the page shown, find where you would go.
B	**Business notice or issue**	Imagine that you need to understand and respond to a recent business notice or unresolved issue. Starting on the page shown, find where you would go.
C	**Access and role management**	Imagine that you need to add, remove, approve, or review another person’s access to a business tax account. Starting on the page shown, find where you would go.
D	**Authorization or client record**	Imagine that you need to submit or check the status of a Power of Attorney or Tax Information Authorization, or obtain a permitted client transcript. 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. How often do you need to move among more than one business, entity, client, IRS account, or IRS service for the same or closely related task?

- ☐ Never
- ☐ Once in the past 12 months
- ☐ Two or three times in the past 12 months
- ☐ Four to six times in the past 12 months
- ☐ Seven or more times in the past 12 months
- ☐ Not sure

Q4. Where would you have expected to find any missing information or feature?

- ☐ On the public IRS.gov professional or business pages
- ☐ On the signed-in business account home page
- ☐ On the signed-in tax professional account home page
- ☐ In the main navigation or menu
- ☐ In notices or messages
- ☐ In payments, records, or authorizations
- ☐ In access or role settings
- ☐ Under help or contact options
- ☐ Another location
- ☐ Nothing was missing
- ☐ Not sure

Q5. Which device did you use for this activity?

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

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

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

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