



## **Idaho State Tax Commission Website User Testing Results**



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# Introduction

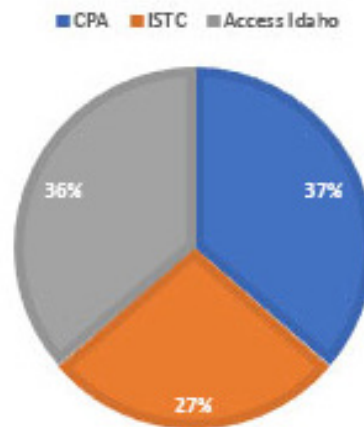
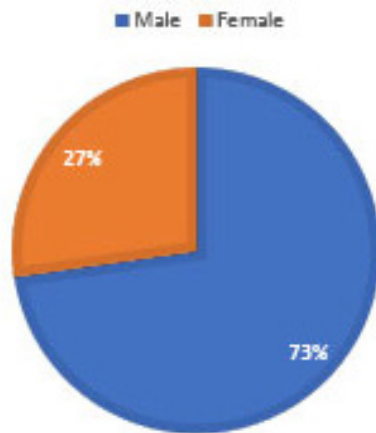
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The Idaho State Tax Commission (ISTC) informs taxpayers about their obligations so everyone can pay their fair share of taxes, and it must enforce Idaho's laws to ensure the fairness of the tax system with those who don't voluntarily comply. They are planning to launch a new website in November 2022.

Access Idaho conducted remote usability tests and recorded each test. The user's path on the website was recorded as well as what they said. Each testing session captured each participant's navigational choices, task completion rates, comments, and feedback. This document includes a summary of our findings as well as individual results.

All tests were conducted on a computer, no mobile phones or tablets were used for this test.

11 individuals completed the test. 3 were ISTC staff, 4 were CPA volunteers ISTC recommended, and 4 were volunteers Access Idaho collected.



# Tasks

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All participants were given the following tasks to complete. Anticipated answers are in red.

1. Please find Form 40 (Individual Income Tax Return)
  - a. 2021 [https://tax-webdev.idaho.gov/document-mngr/forms\\_EFO00089/](https://tax-webdev.idaho.gov/document-mngr/forms_EFO00089/)
  - b. a previous year of this form <https://tax-webdev.idaho.gov/taxes/income-tax/individual-income/forms/archive/>
2. Please find Form 43 (Idaho part-year resident & nonresident income tax return)
  - a. 2021 [https://tax-webdev.idaho.gov/document-mngr/forms\\_EFO00091/](https://tax-webdev.idaho.gov/document-mngr/forms_EFO00091/)
  - b. A previous year of this form  
<https://tax-webdev.idaho.gov/taxes/income-tax/business-income/forms/business-income-tax-forms-archive/>
3. Locate information about Individual Income Tax refunds <https://tax-webdev.idaho.gov/taxes/income-tax/individual-income/refund/>
4. Find the contact information for the department that handles Tax Liens/Collections  
<https://tax-webdev.idaho.gov/contact-us/collection/>
5. Find the contact information for help with TAP <https://tax-webdev.idaho.gov/contact-us/contact-technical-questions/> or <https://tax-webdev.idaho.gov/online-services/e-file/e-file-help/>
6. Find the Tax Commission locations and hours information <https://tax-webdev.idaho.gov/contact-us/visit-us/>
7. Find the Power of Attorney form [https://tax-webdev.idaho.gov/document-mngr/forms\\_BL375E/](https://tax-webdev.idaho.gov/document-mngr/forms_BL375E/)
8. Find where you would estimate Property Tax <https://tax-webdev.idaho.gov/taxes/property/estimate/>
9. Which page option do you prefer to find the options available to pay for an Idaho State Individual Income Tax return or Wine Tax
  - a. <https://tax-webdev.idaho.gov/online-services/e-pay/>
  - b. <https://tax-webdev.idaho.gov/online-services/e-pay/e-pay-options/>
  - c. <https://tax-webdev.idaho.gov/online-services/e-pay/e-pay-options-3/>

## Small Business Owner (everyone can answer these)

10. Please find the Idaho Business Registration (IBR) page <https://tax-webdev.idaho.gov/online-services/business-registration/>
11. Please navigate to where you would sign up for a temporary sellers permit  
<https://idahotap.gentax.com/tap?Link=TSP> - outside of website, just want to make sure they can navigate here
12. Find the classes offered by the Tax Commission [Eventbrite listing](#) or <https://tax-webdev.idaho.gov/about-us/calendar/>
13. Find information about computing withholding tax <https://tax-webdev.idaho.gov/taxes/withholding/computing/>
14. Find which Retailer goods and services can be exempt from sales tax in Idaho  
<https://tax-webdev.idaho.gov/taxes/sales-use/sales-tax/retailers/general/collecting/> or  
<https://tax-webdev.idaho.gov/taxes/sales-use/exemptions/types-of-exemptions/>

## CPA Tasks (only for CPAs)

15. Please find Form 41S (2021) [https://tax-webdev.idaho.gov/document-mngr/forms\\_EFO00028/](https://tax-webdev.idaho.gov/document-mngr/forms_EFO00028/)
16. Find the rules under discussion for Income Tax <https://tax-webdev.idaho.gov/governance/rules/rules-income-tax-rules-committee/>
17. Find the contact information for Revenue Operations Administrator  
<https://tax-webdev.idaho.gov/contact-us/#19>

## Task Completion Success Rate:

| Participant            | Task 1a      | Task 1b       | Task 2a       | Task 2b     | Task 3        | Task 4        | Task 5      | Task 6        | Task 7       | Task 8        | Task 9* | Task 10       | Task 11       | Task 12     | Task 13       | Task 14     |
|------------------------|--------------|---------------|---------------|-------------|---------------|---------------|-------------|---------------|--------------|---------------|---------|---------------|---------------|-------------|---------------|-------------|
| 1. Chris               | X            | X             | X             | X           | X             | X             | X           | X             | X            | X             | B       | X             | X             | X           | X             |             |
| 2. Janet               | X            | X             | X             |             | X             | X             | X           | X             | X            | X             | D       | X             | X             | X           | X             |             |
| 3. Jay                 |              | X             | X             |             | X             | X             | X           | X             | X            | X             | B       | X             | X             | X           | X             | X           |
| 4. Josh                | X            | X             | X             | X           | X             | X             | X           | X             | X            | X             | C       | X             | X             | X           | X             | X           |
| 5. Jeff                | X            | X             | X             | X           | X             | X             | X           | X             | X            | X             | C       | X             | X             | X           | X             |             |
| 6. Gordon              | X            | X             | X             | X           | X             | X             | X           | X             | X            | X             | B       | X             | X             | X           | X             | X           |
| 7. DeeAnn              | X            | X             | X             | X           | X             | X             | X           | X             | X            | X             | C       | X             | X             |             | X             | X           |
| 8. Treven              | X            | X             | X             | X           | X             | X             | X           | X             | X            | X             | A       | X             | X             |             | X             |             |
| 9. Tawnya              | X            | X             | X             | X           | X             | X             | X           | X             | X            | X             | B       | X             | X             | X           | X             | X           |
| 10. Patrick            | X            | X             | X             | X           | X             | X             | X           | X             | X            | X             | B       | X             | X             |             | X             |             |
| 11. Jacob              | X            | X             | X             | X           | X             | X             | X           | X             |              | X             | A       | X             | X             |             | X             |             |
| <b>Completion Rate</b> | 10/11<br>90% | 11/11<br>100% | 11/11<br>100% | 9/11<br>81% | 11/11<br>100% | XX/11<br>100% | 9/11<br>81% | 11/11<br>100% | 10/11<br>90% | 11/11<br>100% | B       | 11/11<br>100% | 11/11<br>100% | 7/11<br>63% | 11/11<br>100% | 5/11<br>45% |

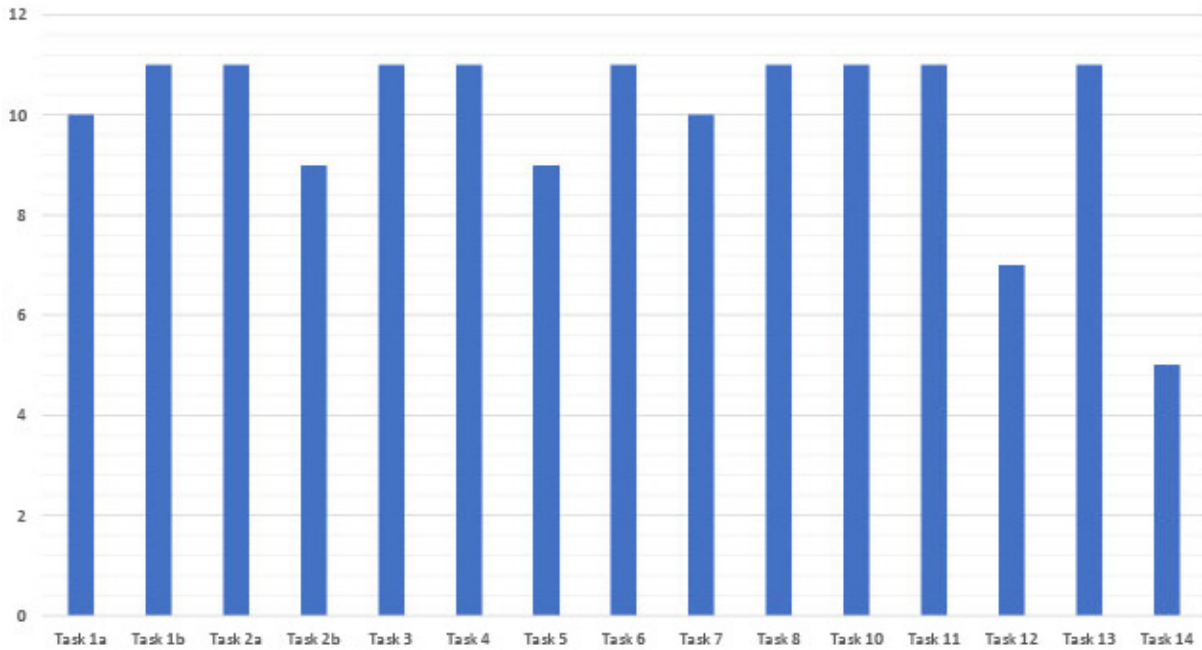
\* Task 9 was a question about which page version the test participant found easiest to navigate and find the information on.

## CPA specific Task Completion Success Rate:

| Participant            | Task 15     | Task 16     | Task 17    |
|------------------------|-------------|-------------|------------|
| 1. Josh                | X           | X           | X          |
| 2. Treven              | X           | X           |            |
| 3. Tawnya              | X           | X           |            |
| 4. Jacob               | X           | X           |            |
| <b>Completion Rate</b> | 4/4<br>100% | 4/4<br>100% | 1/4<br>25% |

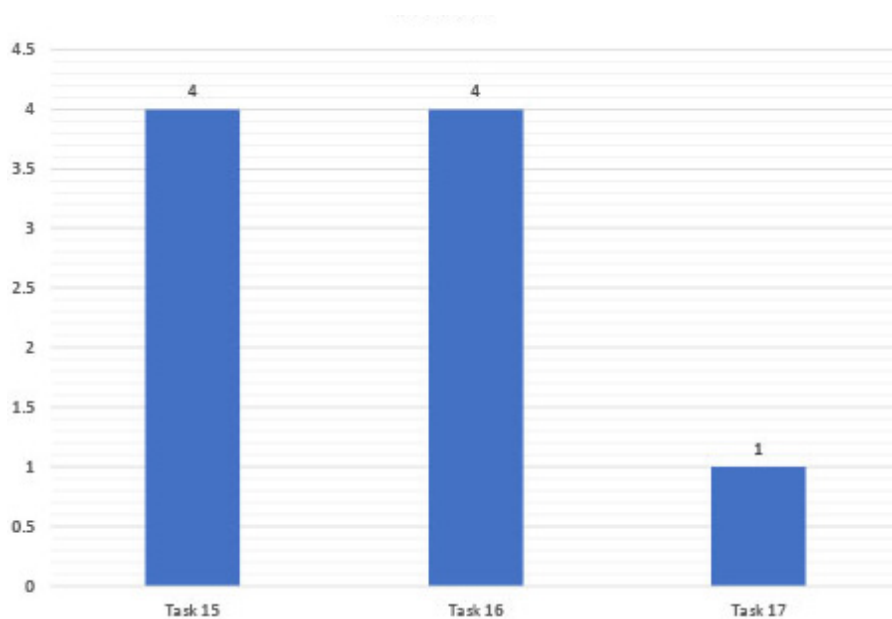
# Results Summary

## GENERAL COMPLETION SUMMARY



\* Task 9 was a question about which page version the test participant found easiest to navigate and find the information on.

## CPA TASKS COMPLETION SUMMARY



# Suggested Updates

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Based on observing the 11 tests, Access Idaho suggests the following changes:

1. The <https://tax-webdev.idaho.gov/contact-us/> is too long and needs to be broken up into separate pages.
2. Classes or Education needs to be listed in the main menu or on the homepage for people to find the available classes.
3. Consider adding the Power of Attorney form to the current business and individual income tax tables.
4. Participants would like to see the current Individual and Business income tax forms tables either in alphabetical order by Form ID or in a special "most popular."
5. There's information we need to add to the "Benefits of each payment type" on the E-Pay page (and that heading may change to "Features" or slightly different wording. We'll discuss this at our next meeting.
6. Any link that is supposed to go to QuickPay needs to go directly into QuickPay and not just the main TAP home page.
7. Need to add "TAP help" or E-Pay/Tap help to contact us menu.
8. Consider making option B of the E-Pay page the main E-Pay page. That was the most popular choice, although it wasn't by a landslide, we may want to discuss further at our next meeting.

# Common Feedback/Observations

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1. People like the new look and overall thought the new site was clean and nice to navigate.
2. Task 14 was difficult for many to find. The information is pretty deep in the site, which is why this task was chosen. We can discuss if there are options to improve this findability.

- The “☒” mark means they completed the task. If the box is empty, they did not complete that task.
- I’ve trimmed the videos so you don’t have to listen to the instructions for the first few minutes on every recording. Each video begins at task 1.

## Tax Commission Website User Testing

**Name:** Chris

**Date:** 10/3/22

**Video file:** 01chris.mp4

Access Idaho volunteer

### General Taxpayer (*everyone can answer these*)

- Please find Form 40 (*Individual Income Tax Return*)
  - 2021
    - Used the search in the data table*
  - a previous year of this form
    - Used the link in the side menu to the archive page*
- Please find Form 43 (*Idaho part-year resident & nonresident income tax return*)
  - 2021
    - Used the search in the data table*
  - A previous year of this form
    - Used the link in the side menu to the archive page*
- Locate information about Individual Income Tax refunds
- Find the contact information for the department that handles Tax Liens/Collections
  - Used the link in the main menu*
- Find the contact information for help with TAP
  - Struggled to find this, was able to find the TAP app and once the new website is launched the help link will go to the new site.*
  - Consider adding a Help with Tap button in main menu under contact us*
- Find the Tax Commission locations and hours information
- Find the Power of Attorney form
- Find where you would estimate Property Tax
- Which option do you prefer to find the options available to pay for an Idaho State Individual Income Tax return or Wine Tax
  - <https://tax-webdev.idaho.gov/online-services/e-pay/>
  - <https://tax-webdev.idaho.gov/online-services/e-pay/e-pay-options/>
    - Liked the table, and the 3 payments at the top*
    - Liked that this page didn't have the side menu on it though, which it only didn't because it was a test page*
  - <https://tax-webdev.idaho.gov/online-services/e-pay/e-pay-options-3/>



**Small Business Owner (everyone can answer these)**

10.  Please find the Idaho Business Registration (IBR) page
11.  Please navigate to where you would sign up for a temporary sellers permit
12.  Find the classes offered by the Tax Commission
  - a. *Found the Eventbrite link on the IBR page*
13.  Find information about computing withholding tax
14.  Find which Retailer goods and services can be exempt from sales tax in Idaho
  - a. *The page we were looking for, <https://tax-webdev.idaho.gov/taxes/sales-use/sales-tax/retailers/general/collecting/>, is pretty buried which is why this was included in the test to see if people could find it. This required my assistance to find.*

**Notes/Other Feedback:**

*Likes the clean look*

*Likes websites (especially when dealing with taxes) that break down the steps needed to take*

## Tax Commission Website User Testing

Name: Janet

Date: 10/3/22

Video file: 02Janet.mp4

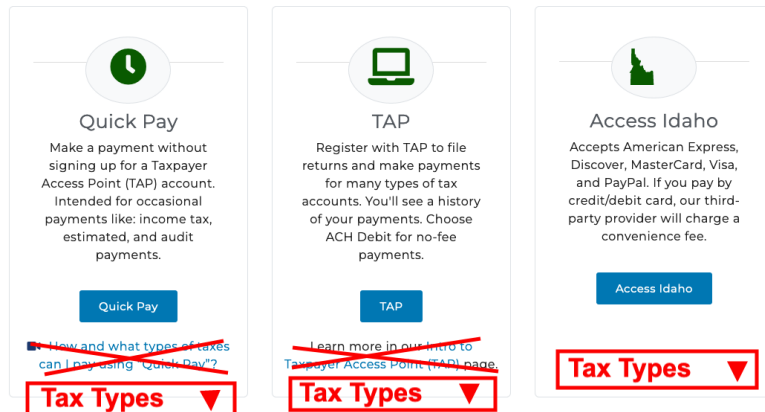
ISTC volunteer

*This video may look slightly different than the others, we had a few technical difficulties with Zoom and had to switch to Teams for this one and Janet shared her screen with me.*

### General Taxpayer (everyone can answer these)

1. Please find Form 40 (Individual Income Tax Return)
  - a.  2021
    - i. *Found this on a page that we will probably be removing. But if we can adjust the table order, this would solve the issue she had.*
    - ii. *Wondered why the form 40 wasn't under the instructions pdf*
  - b.  a previous year of this form
    - i. *Same as above*
2. Please find Form 43 (Idaho part-year resident & nonresident income tax return)
  - a.  2021
    - i. *Had to be told how to use the data table search (only needed to enter "43" not "form 43")*
  - b.  A previous year of this form
    - i. *She could not find the archive link or past years link in the side menu, I had to show her. Struggled with the website search.*
    - ii. *Suggested to change order of forms on the archive*
3.  Locate information about Individual Income Tax refunds
  - a. *On the "Where is my Refund?" link from the home page she would expect that to take the user directly into TAP rather than the information page.*
  - b. *Alternatively, make the link on the informational page a button to make it stand out more.*
4.  Find the contact information for the department that handles Tax Liens/Collections
  - a. *Add "Tax Liens" to the "Collection" listing under Contact Us menu.*
  - b. *Suggestion to change "DEPARTMENTS" listing in the contact us menu to "SUBJECTS"*
5.  Find the contact information for help with TAP
  - a. *Found on the E-File help page, which includes some of the same help as the technical questions page.*
  - b. *Suggestion to adjust the menu name to separate options for E-File help and E-Pay help or add TAP Help in the contact us too*
  - c. *Suggestion to add QuickPay help too because not everyone may know that QuickPay is inside of TAP*
    - i. *[taxrep@tax.idaho.gov](mailto:taxrep@tax.idaho.gov) or general phone number with information on the new page about QuickPay and help*

6.  Find the Tax Commission locations and hours information
7.  Find the Power of Attorney form
8.  Find where you would estimate Property Tax
9. Which option do you prefer to find the options available to pay for an Idaho State Individual Income Tax return or Wine Tax
  - a.  <https://tax-webdev.idaho.gov/online-services/e-pay/>
  - b.  <https://tax-webdev.idaho.gov/online-services/e-pay/e-pay-options/>
  - c.  <https://tax-webdev.idaho.gov/online-services/e-pay/e-pay-options-3/>
  - d.  Hybrid approach:
    - i. *To view her feedback regarding this section, view from roughly 0:45-1:15 on her video file (02Janet.mp4)*
    - ii. *Preferred the 3 boxes from option 2 without the table, but in the 3 boxes would be a dropdown that would show the tax types available for that payment type. (Similar to the mockup below)*



1.
  - iii. *We need to adjust the QuickPay links to go directly to QuickPay, not just the TAP home page*
  - iv. *Add eCheck to the Access Idaho info*
  - v. *Would like to see QuickPay just listed as "QuickPay" not "QuickPay in TAP"*
  - vi. *She helped clarify some of the differences between QuickPay and TAP for me, which was helpful and I will incorporate her feedback in the "Benefits of each payment option" section (that heading may change).*

**Small Business Owner (everyone can answer these)**

10.  Please find the Idaho Business Registration (IBR) page
  - a. *To view this feedback, view from roughly 1:15-1:39 (02Janet.mp4)*
  - b. *She had a lot of feedback here regarding questions they get about what permits Businesses need to get, not necessarily just the permits within IBR, but general Business permit questions.*
  - c. *Also brought up some good points about Vaping and the questions they receive about Vaping permits required. Wine and Beer too.*
  - d. *Desire to see "Business owners – how to get started" which would include a list of permits and/or applications businesses need to get started in specific areas. This would contain information/links to other agencies as well, such as SOS, Labor, etc.*

- i. *I'm not clear if the Business Wizard answers this need?*
11.  Please navigate to where you would sign up for a temporary sellers permit
- a. *Looked under Sales Tax first and didn't see or think to click on the "Permits" button at first. She found the page by using the site search.*
12.  Find the classes offered by the Tax Commission
- a. *She used the link to the classes from the search, the page "Register for a tax class"*
- b. *Would expect to see "Classes" or something more specific about registering for classes in the main menu under Online Services or a separate listing for "Education"*
13.  Find information about computing withholding tax
14.  Find which Retailer goods and services can be exempt from sales tax in Idaho
- a. *She would look for this under the Rules documents, which it may be here too but it wasn't one of the original pages we were looking for.*

**Notes/Other Feedback:**

*Most of the calls she receives are from new business owners and their questions regarding how they get their business started*

*Or, a person calling that is doing a specific thing and not sure if they need a permit*

*Also gets calls about QuickPay because it's not clear how the user needs to code the payments*

*Overall, likes the new design of the website*

## Tax Commission Website User Testing

Name: Jay

Date: 10/4/22

Video file: 03Jay.mp4

ISTC volunteer

*This video may look slightly different than the others, for some reason the individual video boxes on the right are larger on this one.*

### General Taxpayer (everyone can answer these)

1. Please find Form 40 (Individual Income Tax Return)
  - a.  2021
    - i. *Used the search on the table on <https://tax-webdev.idaho.gov/taxes/income-tax/individual-income/forms/>, but included "form" in the search where only 40 would pull it up*
    - ii. *Form 40 needs to be closer to the instructions*
  - b.  a previous year of this form
2. Please find Form 43 (Idaho part-year resident & nonresident income tax return)
  - a.  2021
  - b.  A previous year of this form
    - i. *The order of the forms needs to be sequential*
3.  Locate information about Individual Income Tax refunds
  - a. *Likes the updated look, easier to read*
4.  Find the contact information for the department that handles Tax Liens/Collections
5.  Find the contact information for help with TAP
  - a. *Would like to see something listed specifically saying TAP in the contact menu*
6.  Find the Tax Commission locations and hours information
7.  Find the Power of Attorney form
8.  Find where you would estimate Property Tax
9. Which option do you prefer to find the options available to pay for an Idaho State Individual Income Tax return or Wine Tax
  - a.  <https://tax-webdev.idaho.gov/online-services/e-pay/>
  - b.  <https://tax-webdev.idaho.gov/online-services/e-pay/e-pay-options/>
    - i. *If the check boxes are linked to the apps to pay, this option is his first choice.*
  - c.  <https://tax-webdev.idaho.gov/online-services/e-pay/e-pay-options-3/>
    - i. *For someone coming in once a year, not familiar with the website this is a good option too*

**Small Business Owner (everyone can answer these)**

10.  Please find the Idaho Business Registration (IBR) page
11.  Please navigate to where you would sign up for a temporary sellers permit
  - a. *Suggested to add a quicker way to get there in the menu or homepage business box*
12.  Find the classes offered by the Tax Commission
  - a. *Suggested adding a link in the footer to make this easier to find*
  - b. *He found the page by using the website search, and I think we can add additional text on the pages that will help that come up earlier in results.*
13.  Find information about computing withholding tax
14.  Find which Retailer goods and services can be exempt from sales tax in Idaho
  - a. *He found a different page, not the original page we had in mind for them to find but the page he did find does include the examples.*

**Notes/Other Feedback:**

*Likes the Individual, Business, and Property boxes on the home page, more consistent with what you see on other state tax commission websites*

## Tax Commission Website User Testing

Name: Josh

Date: 10/4/22

Video file: 04Josh.mp4

CPA volunteer

### General Taxpayer (*everyone can answer these*)

1. Please find Form 40 (*Individual Income Tax Return*)
  - a.  2021
    - i. *Used table search to find it*
  - b.  a previous year of this form
2. Please find Form 43 (*Idaho part-year resident & nonresident income tax return*)
  - a.  2021
  - b.  A previous year of this form
    - i. *Really likes the table search feature*
3.  Locate information about Individual Income Tax refunds
  - a. *Likes the info about the refund time frame expectation*
4.  Find the contact information for the department that handles Tax Liens/Collections
5.  Find the contact information for help with TAP
  - a. *He found this on the main contact us page, which this info will be split up further*
  - b. *Would expect to see this listed as TAP help in the menu too*
6.  Find the Tax Commission locations and hours information
  - a. *He used the link in the footer*
7.  Find the Power of Attorney form
8.  Find where you would estimate Property Tax
9. Which option do you prefer to find the options available to pay for an Idaho State Individual Income Tax return or Wine Tax
  - a.  <https://tax-webdev.idaho.gov/online-services/e-pay/>
  - b.  <https://tax-webdev.idaho.gov/online-services/e-pay/e-pay-options/>
    - i. *A bit "information overload" with the table*
  - c.  <https://tax-webdev.idaho.gov/online-services/e-pay/e-pay-options-3/>
    - i. *Likes how the information is organized in the accordions and you can see what applies to that specific tax type.*

**Small Business Owner (everyone can answer these)**

10.  Please find the Idaho Business Registration (IBR) page
11.  Please navigate to where you would sign up for a temporary sellers permit
12.  Find the classes offered by the Tax Commission
  - a. *Looked for this in the footer*
  - b. *Suggested adding "Classes" in the menu in addition to the calendar link*
13.  Find information about computing withholding tax
14.  Find which Retailer goods and services can be exempt from sales tax in Idaho
  - a. *He found the "types of exemptions" page*
  - b. *The wording may be a little confusing, not sure if we can improve that though.*

**CPA Tasks (only for CPAs)**

15.  Please find Form 41S (2021)
16.  Find the rules under discussion for Income Tax
  - a. *He found the current rules quickly, took a little longer to find the committee page*
17.  Find the contact information for Revenue Operations Administrator
  - a. *Likes the idea to split the big contact us page up*

**Notes/Other Feedback:**

*He was not familiar with the current website*

*Overall, easy to navigate*

*Good side menu and search features*



## Tax Commission Website User Testing

Name: Jeff

Date: 10/4/22

Video file: 05Jeff.mp4

AI volunteer

### General Taxpayer (everyone can answer these)

1. Please find Form 40 (*Individual Income Tax Return*)
  - a.  2021
    - i. *Found the instructions documents first*
  - b.  a previous year of this form
2. Please find Form 43 (*Idaho part-year resident & nonresident income tax return*)
  - a.  2021
  - b.  A previous year of this form
    - i. *Would expect to find this in sequential order*
3.  Locate information about Individual Income Tax refunds
4.  Find the contact information for the department that handles Tax Liens/Collections
5.  Find the contact information for help with TAP
  - a. *He found this on the e-file help page*
6.  Find the Tax Commission locations and hours information
7.  Find the Power of Attorney form
8.  Find where you would estimate Property Tax
9. Which option do you prefer to find the options available to pay for an Idaho State Individual Income Tax return or Wine Tax
  - a.  <https://tax-webdev.idaho.gov/online-services/e-pay/>
    - i. *Didn't see that the credit card options were below the ACH ones at first*
  - b.  <https://tax-webdev.idaho.gov/online-services/e-pay/e-pay-options/>
    - i. *Liked that the 3 e-pay options were at the top, and more information was in the table below.*
  - c.  <https://tax-webdev.idaho.gov/online-services/e-pay/e-pay-options-3/>
    - i. *Likes this option best with some additions. Would like to see a quick summary or teaser about the e-pay option in each accordion next to the link so they don't have to scroll all the way down to see the different features. (See more information below for feature comparison)*
    - ii. *Move ACH credit to its own page and link to it like the locations or mailing links at the top of the page.*
    - iii. *Add the required message about payments over \$100,000*

**Small Business Owner (everyone can answer these)**

10.  Please find the Idaho Business Registration (IBR) page
11.  Please navigate to where you would sign up for a temporary sellers permit
12.  Find the classes offered by the Tax Commission
  - a. *Went to the site search because he couldn't find the word "Class or Classes" in the areas he looked first.*
13.  Find information about computing withholding tax
14.  Find which Retailer goods and services can be exempt from sales tax in Idaho
  - a. *Hard to find*

**Notes/Other Feedback:**

*Felt confident that he could find his way around the website besides task #14.*

## Tax Commission Website User Testing

Name: Gordon

Date: 10/5/22

Video file: 06Gordon.mp4

ISTC volunteer

### General Taxpayer (everyone can answer these)

1. Please find Form 40 (*Individual Income Tax Return*)
  - a.  2021
    - i. *Would like to see the most commonly used forms at the top of the table*
  - b.  a previous year of this form
2. Please find Form 43 (*Idaho part-year resident & nonresident income tax return*)
  - a.  2021
  - b.  A previous year of this form
3.  Locate information about Individual Income Tax refunds
4.  Find the contact information for the department that handles Tax Liens/Collections
5.  Find the contact information for help with TAP
  - a. *He found the E-file Help page and suggested that we want to add TAP help in the menu*
6.  Find the Tax Commission locations and hours information
7.  Find the Power of Attorney form
8.  Find where you would estimate Property Tax
9. Which option do you prefer to find the options available to pay for an Idaho State Individual Income Tax return or Wine Tax
  - a.  <https://tax-webdev.idaho.gov/online-services/e-pay/>
    - i. *We need to keep the message in the blue alert box about the debit block on whichever option of the e-pay page we decide to go with.*
  - b.  <https://tax-webdev.idaho.gov/online-services/e-pay/e-pay-options/>
    - i. *The table is busy, but realizes that ISTC covers a lot of tax types*
    - ii. *Discussed changing the "benefits" title to features*
  - c.  <https://tax-webdev.idaho.gov/online-services/e-pay/e-pay-options-3/>

### Small Business Owner (everyone can answer these)

10.  Please find the Idaho Business Registration (IBR) page
  - a. *Suggested that the "Register my Business" link on the Business box on homepage needs to be changed to "Apply for Business Permits"*

11.  Please navigate to where you would sign up for a temporary sellers permit
  - a. *Would like to see an emphasis on the videos before they sign up. Put the 2 videos from the YouTube page on this page before the link to get the Temp permit.*
12.  Find the classes offered by the Tax Commission
  - a. *Used the site search to search for "Training" – we need to add this as keyword or part of the page*
  - b. *Suggested adding the link to classes or upcoming classes to the home page*
13.  Find information about computing withholding tax
14.  Find which Retailer goods and services can be exempt from sales tax in Idaho
  - a. *Hard*

#### Notes/Other Feedback:

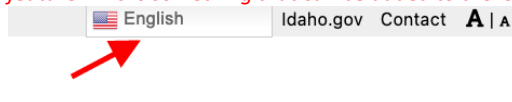
*Asked for a page that would display ALL current forms, this would be used primarily for customer support. There used to be a page like this on the website previously, but that page had been removed from the production site. He suggested it would be helpful for the support staff, even if it's kind of a hidden page.*

*Consider changing "Consumption Taxes" heading under taxes in main menu to "Product Taxes"*

*Consider adding link to Contractors earlier in the sales tax side menu based on the number of calls they get or move the contractors up higher on the page.*

*His team may want to keep the Hubs for phone calls*

*Also discussed google translation feature and how there are a handful of other agencies that utilize this feature. This is something that can be added to the ISTC website at any time if you want it.*



## Tax Commission Website User Testing

Name: DeeAnn

Date: 10/5/22

Video file: 07DeeAnn.mp4

AI volunteer

### General Taxpayer (everyone can answer these)

1. Please find Form 40 (*Individual Income Tax Return*)
  - a.  2021
    - i. *Needs to be closer to the instructions document*
  - b.  a previous year of this form
    - i. *Easy to find this*
2. Please find Form 43 (*Idaho part-year resident & nonresident income tax return*)
  - a.  2021
  - b.  A previous year of this form
3.  Locate information about Individual Income Tax refunds
4.  Find the contact information for the department that handles Tax Liens/Collections
5.  Find the contact information for help with TAP
  - a. *Would use the Help link from the TAP application, which would go to the new site once it's live*
6.  Find the Tax Commission locations and hours information
7.  Find the Power of Attorney form
8.  Find where you would estimate Property Tax
9. Which option do you prefer to find the options available to pay for an Idaho State Individual Income Tax return or Wine Tax
  - a.  <https://tax-webdev.idaho.gov/online-services/e-pay/>
    - i. *Wouldn't scroll far enough to see all the options*
  - b.  <https://tax-webdev.idaho.gov/online-services/e-pay/e-pay-options/>
  - c.  <https://tax-webdev.idaho.gov/online-services/e-pay/e-pay-options-3/>
    - i. *Likes the table from #2 but feels like #3 is more user-friendly*
    - ii. *This option is easier to see the info by tax type first*

### Small Business Owner (everyone can answer these)

10.  Please find the Idaho Business Registration (IBR) page

11.  Please navigate to where you would sign up for a temporary sellers permit
12.  Find the classes offered by the Tax Commission
  - a. *Expected to see Classes or Register for Classes option in menu*
13.  Find information about computing withholding tax
14.  Find which Retailer goods and services can be exempt from sales tax in Idaho
  - a. *Looked in the forms and guides first, I had to help steer her in the right direction a bit*

**Notes/Other Feedback:**

*Likes the new layout/design. It's easier to read and cleaner.*

## Tax Commission Website User Testing

Name: Treven

Date: 10/5/22

Video file: 08Treven.mp4

CPA volunteer

### General Taxpayer (*everyone can answer these*)

1. Please find Form 40 (*Individual Income Tax Return*)
  - a.  2021
  - b.  a previous year of this form
2. Please find Form 43 (*Idaho part-year resident & nonresident income tax return*)
  - a.  2021
    - i. *Noted we need to update this form name, should be 2021 not 2020*
  - b.  A previous year of this form
3.  Locate information about Individual Income Tax refunds
  - a. *Speed up returns sub title confused him at first*
4.  Find the contact information for the department that handles Tax Liens/Collections
  - a. *I had to explain tax liens a bit here, not sure if we need to provide more information about what Tax Liens are or if most people will know this*
5.  Find the contact information for help with TAP
  - a. *Would use the Help button in TAP, which I explained this link would go to the new site once it's live.*
  - b. *Tap Help in the main menu would be helpful*
6.  Find the Tax Commission locations and hours information
7.  Find the Power of Attorney form
8.  Find where you would estimate Property Tax
9. Which option do you prefer to find the options available to pay for an Idaho State Individual Income Tax return or Wine Tax
  - a.  <https://tax-webdev.idaho.gov/online-services/e-pay/>
    - i. *Likes that the payment types are explained here*
    - ii. *It's not clear what tax types are available to pay in each e-pay option though, but still prefers the layout of A.*
  - b.  <https://tax-webdev.idaho.gov/online-services/e-pay/e-pay-options/>
  - c.  <https://tax-webdev.idaho.gov/online-services/e-pay/e-pay-options-3/>
    - i. *Doesn't like to have to click for every single accordion to open*

**Small Business Owner (everyone can answer these)**

10.  Please find the Idaho Business Registration (IBR) page
11.  Please navigate to where you would sign up for a temporary sellers permit
12.  Find the classes offered by the Tax Commission
  - a. *Expected to see a link on the home page or in menu*
13.  Find information about computing withholding tax
14.  Find which Retailer goods and services can be exempt from sales tax in Idaho
  - a. *Expected to see an exemptions box on the retailers page [tax-webdev.idaho.gov/taxes/sales-use/sales-tax/retailers](http://tax-webdev.idaho.gov/taxes/sales-use/sales-tax/retailers)*

**CPA Tasks (only for CPAs)**

15.  Please find Form 41S (2021)
16.  Find the rules under discussion for Income Tax
  - a. *Hard to find if you don't know that the committee handles this*
17.  Find the contact information for Revenue Operations Administrator
  - a. *Expected to see this on the About Us page too where the organization section lists the different departments.*

**Notes/Other Feedback:**

*Overall, most of the tasks were easy to find and he had a good experience navigating the new site, a few were hard because they were deeper in the site.*



## Tax Commission Website User Testing

Name: Tawnya

Date: 10/5/22

Video file: 09Tawnya.mp4

CPA volunteer

### General Taxpayer (*everyone can answer these*)

1. Please find Form 40 (*Individual Income Tax Return*)
  - a.  2021
  - b.  a previous year of this form
    - i. *First searched for this in the current forms table until she noticed that the page was titled current forms*
2. Please find Form 43 (*Idaho part-year resident & nonresident income tax return*)
  - a.  2021
  - b.  A previous year of this form
    - i. *Expected to see this in numerical order*
3.  Locate information about Individual Income Tax refunds
  - a. *Most people will want the link to TAP quickly, but understands why this page is here for more information*
4.  Find the contact information for the department that handles Tax Liens/Collections
5.  Find the contact information for help with TAP
  - a. *Found the help page on the current site from TAP, which will work once the new site goes live*
  - b. *Would like to see "Help with TAP" or contact TAP in the contact us menu*
6.  Find the Tax Commission locations and hours information
7.  Find the Power of Attorney form
  - a. *First looked for this in the current individual income table. She would like to see this form there and under the current Business income table too.*
  - b. *Access Idaho also needs to double check why that form wasn't coming up in the website search*
  - c. *Ended up finding it on the "Forms for Tax Preparers" page*
8.  Find where you would estimate Property Tax
9. Which option do you prefer to find the options available to pay for an Idaho State Individual Income Tax return or Wine Tax
  - a.  <https://tax-webdev.idaho.gov/online-services/e-pay/>
    - i. *Too confusing with the multiple options*
  - b.  <https://tax-webdev.idaho.gov/online-services/e-pay/e-pay-options/>

i. Likes how the 3 e-pay options are listed at the top. A lot to read in the table, but it's there if you need it.

c.  <https://tax-webdev.idaho.gov/online-services/e-pay/e-pay-options-3/>

i. Too much reading. Reminds her of the legislature statute page and doesn't seem as friendly as option 2.

#### Small Business Owner (everyone can answer these)

10.  Please find the Idaho Business Registration (IBR) page
11.  Please navigate to where you would sign up for a temporary sellers permit
12.  Find the classes offered by the Tax Commission
  - a. Found the property tax classes first
  - b. Expected to see "classes" or "education" in the menu or on the homepage.
13.  Find information about computing withholding tax
14.  Find which Retailer goods and services can be exempt from sales tax in Idaho

#### CPA Tasks (only for CPAs)

15.  Please find Form 41S (2021)
16.  Find the rules under discussion for Income Tax
  - a. Suggested adding a link for "Proposed" rules or something similar that would help lead the user here in they didn't know that the committee handles this.
17.  Find the contact information for Revenue Operations Administrator
  - a. Hard to find where it currently is

#### Notes/Other Feedback:

The TAP and Contact links in the top right (gray bar) don't look like buttons so she didn't know she could click them.

Consider adding a date to the alert in the top yellow so people know when the alert was posted. Example: 10/5/22: Our call center is experiencing high call volumes...

## Tax Commission Website User Testing

Name: Patrick

Date: 10/6/22

Video file: 010Patrick.mp4

AI volunteer

### General Taxpayer (*everyone can answer these*)

1. Please find Form 40 (*Individual Income Tax Return*)
  - a.  2021
  - b.  a previous year of this form
2. Please find Form 43 (*Idaho part-year resident & nonresident income tax return*)
  - a.  2021
  - b.  A previous year of this form
    - i. *Expected to see this in numerical order*
3.  Locate information about Individual Income Tax refunds
4.  Find the contact information for the department that handles Tax Liens/Collections
5.  Find the contact information for help with TAP
  - a. *Would expect to see "Help with TAP" or contact TAP in the contact us menu*
6.  Find the Tax Commission locations and hours information
7.  Find the Power of Attorney form
  - a. *First looked for this in the current individual income table.*
  - b. *Ended up finding it on the popular forms menu*
8.  Find where you would estimate Property Tax
9. Which option do you prefer to find the options available to pay for an Idaho State Individual Income Tax return or Wine Tax
  - a.  <https://tax-webdev.idaho.gov/online-services/e-pay/>
  - b.  <https://tax-webdev.idaho.gov/online-services/e-pay/e-pay-options/>
    - i. *Likes the table, makes it easy to do the comparison*
  - c.  <https://tax-webdev.idaho.gov/online-services/e-pay/e-pay-options-3/>
    - i. *Too busy*

*General feedback: acknowledged that we need to add the additional details here discussed during the test that I shared I learned. For example, QuickPay doesn't do debit/credit payments, to create an account in TAP they mail something before you can file, etc*

*Suggestion, can we add the fee amounts for CC/Debit in TAP and Access Idaho information on this page?*

**Small Business Owner (everyone can answer these)**

10.  Please find the Idaho Business Registration (IBR) page
11.  Please navigate to where you would sign up for a temporary sellers permit
  - a. *On the taxes/sales-use/permits/ page, maybe add a verb like "Register for a Temporary.." to the Temporary seller's permits button.*
12.  Find the classes offered by the Tax Commission
  - a. *Add Education/Classes to menu*
13.  Find information about computing withholding tax
14.  Find which Retailer goods and services can be exempt from sales tax in Idaho
  - a. *Hard to find, might be easier if he had more knowledge about this specific tax area.*
  - b. *All the general links looked the same*

**Notes/Other Feedback:**

*New website will be a nice visual improvement*

## Tax Commission Website User Testing

Name: Jacob

Date: 10/7/22

Video file: 011Jacob.mp4

CPA volunteer

### General Taxpayer (*everyone can answer these*)

1. Please find Form 40 (*Individual Income Tax Return*)
  - a.  2021
    - i. *It would be nice to see the instructions after the form 40, close to it like the IRS site*
  - b.  a previous year of this form
    - i. *Same, it would be nice to see the instructions close*
2. Please find Form 43 (*Idaho part-year resident & nonresident income tax return*)
  - a.  2021
  - b.  A previous year of this form
3.  Locate information about Individual Income Tax refunds
  - a. *Suggested making the link to TAP a button to help it stand out more.*
4.  Find the contact information for the department that handles Tax Liens/Collections
5.  Find the contact information for help with TAP
  - a. *Would use the Help button in TAP, which I explained this link would go to the new site once it's live.*
  - b. *Tap Help in the main menu would be helpful*
6.  Find the Tax Commission locations and hours information
7.  Find the Power of Attorney form
  - a. *First looked in the Current Individual Income tax forms table and then business.*
8.  Find where you would estimate Property Tax
9. Which option do you prefer to find the options available to pay for an Idaho State Individual Income Tax return or Wine Tax
  - a.  <https://tax-webdev.idaho.gov/online-services/e-pay/>
    - i. *Likes the table from #2 and how it's linked at the top of this page if people need further information about what they can use to pay, but likes the explanation of payment options on this one best.*
  - b.  <https://tax-webdev.idaho.gov/online-services/e-pay/e-pay-options/>
  - c.  <https://tax-webdev.idaho.gov/online-services/e-pay/e-pay-options-3/>
    - i. *Too long*

**Small Business Owner (*everyone can answer these*)**

- 10.  Please find the Idaho Business Registration (IBR) page
- 11.  Please navigate to where you would sign up for a temporary sellers permit
- 12.  Find the classes offered by the Tax Commission
  - a. *Expected to see a link on the home page or in menu saying Education or Classes*
- 13.  Find information about computing withholding tax
- 14.  Find which Retailer goods and services can be exempt from sales tax in Idaho
  - a. *Hard to find*

**CPA Tasks (*only for CPAs*)**

- 15.  Please find Form 41S (2021)
- 16.  Find the rules under discussion for Income Tax
- 17.  Find the contact information for Revenue Operations Administrator
  - a. *Hard to find*

**Notes/Other Feedback:**

*Overall the new site looks nice*