Making Taxes Less Taxing

HFI's usability study helps streamline the California Tax Service Center to serve citizens better

"*Nothing is certain but death and taxes*"—Ben Franklin

It's hard to argue with Ben Franklin. But if taxes are so certain, then shouldn't getting information and doing your taxes be pretty easy?

The State of California thinks so. That's why they built the California Tax Service Center—a Web-based one-stop shop to get information, forms and file income tax, sales tax and other business related taxes.

Californians embraced the value of the Service Center immediately. "This site has everything you need," one tax-payer said. But people said other things, too—the site had too much information. Citizens were not sure where to start. And they weren't always sure they had seen all the information they needed.

The Tax Service Center is a great idea, but usability problems were keeping California taxpayers from getting the most out of it. And with over 50 million visitors to the site each year, State tax officials knew they were missing a big opportunity to make the system more efficient and the process easier. So they called in Human Factors International (HFI) to perform a usability review.

The Challenge:
Turning too much information into just enough

The Tax Service Center helps citizens learn what they need to know and helps California collect taxes more efficiently. In addition, the California Tax Service Center site is an online ambassador for the California State Government. Think of it this way—when do you deal with your state government? Besides registering your car, it's paying your taxes. For most people, that's it.
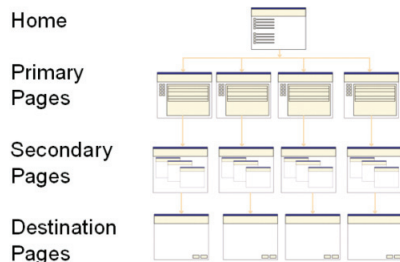
So if the Tax Service Center offers what you need when you need it, with a clear presentation and tools that are easy to use, you'll feel good about the government. The Tax Service Center consortium knows that a good site will increase public trust and confidence.

Tax Service Center Site Organization

What site designers see...
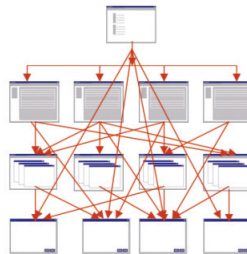The structure seems obvious

Home
Primary Pages
Secondary Pages
Destination Pages

What citizens see...
Navigation feels random and complex

What citizens really want...
A clear step-by-step path

Insight into citizens' mindset helps determine why problems exist
Directly observing real citizens doing real tasks helps designers understand the citizens' mental model and how it may differ from the site model.

The California Tax Service Center, however, is an ambitious endeavor. The site integrates content from several agencies: the Franchise Tax Board (FTB), Employment Development Department (EDD), Board of Equalization (BOE) and the federal Internal Revenue Service. The amount and diversity of content is staggering. So understanding how citizens approach the content is critical. Moreover, citizens want to get answers to their questions—not find out who they need to ask. So the identities of individual agencies need to fade into the background, with the focus staying on the central topic—taxes.

HFI's Approach: Finding the gaps

HFI's objective was to learn how citizens work with tax information. HFI looked at the site through citizen's eye—literally. HFI employed eye-tracking technology to discover what users looked at, and what they didn't. The analysis showed that the site's visual design and layout often distracted users by drawing their attention to less important information on the site, making it harder to get what they came for. Users often left the site feeling they had invested a lot of time without finding what they were seeking.

HFI's study also evaluated the ability of citizens to complete key tasks. Analysis showed that participants completed only 29% of the tasks with ease. Much of the time (41%) they could not complete the tasks at all.

There was a significant gap between what the site design guided the citizens to do and what they really wanted to get done.

HFI's Solution: Closing the gap through citizen-centered design

HFI's report summarized the gaps between what users expected and the way the site design worked. HFI then provided concrete redesign recommendations to improve the user experience. Finally, HFI worked with the Tax Service Center team to prioritize the recommendations so that they would have the greatest impact within a reasonable implementation and revision schedule. Key recommendations included:

- *Guide citizens' attention*: Use visual design to draw users' eyes to key information.

- *Make things easy to find*: Learn what people come to the Tax Service Center for, then create a navigation structure that highlights frequently used information and provides 'common sense' paths to less frequently used content.

- *Write for taxpayers, not tax experts*: Avoid jargon—use simple, direct language that works for the Web and educates citizens.

- *Connect people with* what *they need—not* who: Focus on giving citizens the tools and information they need, not telling them who formed the policy or updated the form.

Results and Next Steps: Putting taxpayers in the driver's seat

The California Tax Service Center paid close attention to HFI's recommendations. The new design reflects a clear, citizen-centered information architecture. The visual design and layout draws users' eyes to the right information.

Improving the citizen experience on the California Tax Service Center not only helps citizens, it saves California money:

- Increasing citizens' tax literacy helps people pay their taxes on-time and correctly

- More correct filings reduce the cost of alerting and advising those who have made errors and need to refile.

- Creating eServices helps citizens help themselves, reducing the need for call centers and help desk support.

- Encouraging self-service and e-service helps the state go green by reducing the use of paper—for forms, mailings, information booklets and other notices.

These changes result in a significant savings for the State of California—a savings easily many times greater than the cost of the usability project itself.

"Return on investment (ROI) is a central issue [for State Government]," says Donna Freeman, business manager of the California Tax Service Center and a Certified Usability Analyst. "Government has to be cost-effective. The state of California has really embraced the idea of usability…. Usability is good business."

One more thing to be certain of.

Human Factors International

1–800–242–4480 US/Canada
1–641–472–4480

+44 (0)20 7953 4010 Europe
+91 (22) 2570 8465 Asia

hfi@humanfactors.com
www.humanfactors.com