

Virginia Tax Website Overhaul

FTA Annual Meeting

June 2017

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Strategic Plan

How a SWOT Analysis led to our site redesign

In 2015, we engaged a consultant to help us develop a strategic plan

- ▶ Activities included a leadership retreat and workshops
- ▶ But the crowning jewel of the experience was a SWOT analysis
 - ▶ Detailed feedback from a variety of internal and external stakeholders
 - ▶ State government leaders
 - ▶ Professional tax preparers
 - ▶ Local Commissioners of the Revenue
 - ▶ Individual and corporate taxpayers
 - ▶ Leaders and employees within our organization

The SWOT results flagged our website as a big area of opportunity

- ▶ In response to this question:

What is one thing that the Virginia Department of Taxation could do to improve the way it assist individual taxpayers?"

...the suggestion cited the most was **improve the website**

- ▶ This guidance was affirmed not long afterward by my experience at a meeting for state leaders

Imagine seeing this projected on an IMAX screen:

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The screenshot shows a web browser window displaying the Virginia Department of Taxation website. The browser's address bar shows www.tax.virginia.gov. The website header includes the Virginia.gov logo, navigation links for Agencies and Governor, and a search bar. The main navigation menu features buttons for Online Services, Individuals, Businesses, Forms, and Site Tools. A central banner displays the text: "Offices Closed: The Virginia Department of Taxation will be closed Monday, October 10, for Columbus Day." Below this, a graphic titled "Review of Tax Return Letter" asks, "Did you receive this letter? Find out why and what steps you need to take here." The graphic shows a sample letter with the heading "REVIEW OF TAX RETURN LETTER" and the date "April 11, 2016". A sidebar on the left contains links for FAQs, Laws Rules And Decisions, Taxpayer Rights, Tax Credits, Tax Professionals, Facts & Figures, Localities, and Contact Us, along with a "View Our Expenses" link and an "eVA Transparency in Procurement" logo. A sidebar on the right includes links for About Us, Working With Us, News, Taxpayer Alerts - Updated August 16, 2016, Identity Theft, Our Organization, social media icons for Facebook, Twitter, and YouTube, "Your Opinion", "e-Alerts Sign-up", and a section about computer and browser compatibility. The Windows taskbar at the bottom shows various open applications and the system clock indicating 8:56 AM on 10/5/2016.

User Research

There's no substitute for primary source data

We chose to work with CapTech, a tech + design consultancy, on a two-phased project

▶ **Phase 1:**

Web Design

▶ **Phase 2:**

Web Implementation

The design phase began with extensive user research: we collected primary source data from multiple audiences

▶ Surveys

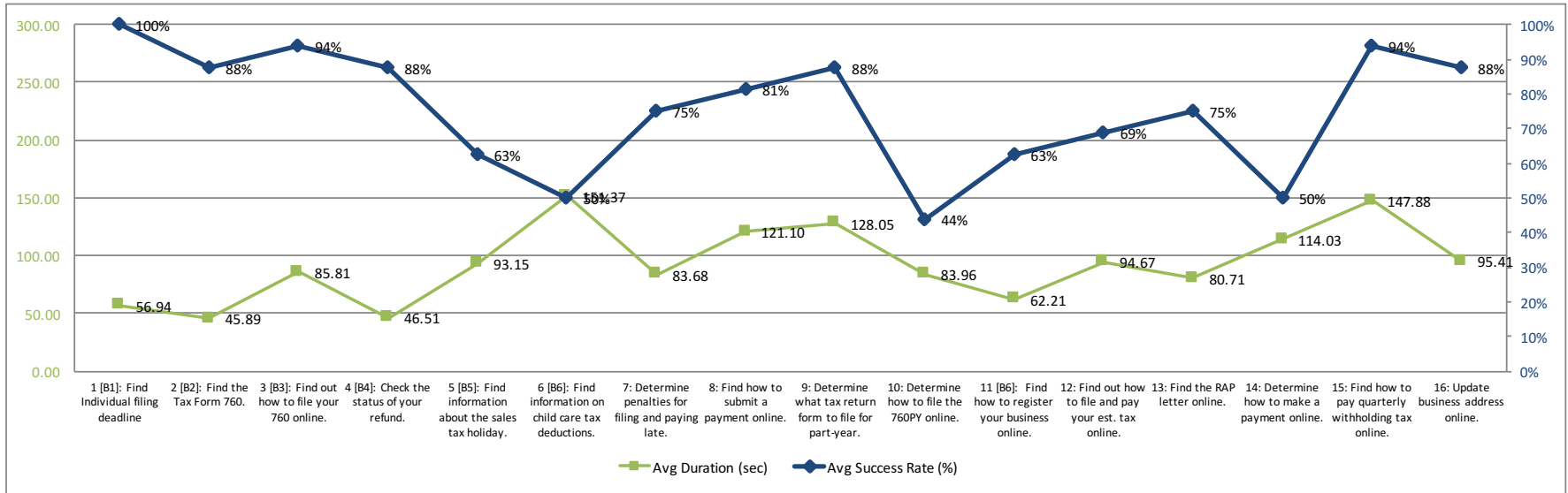
- ▶ Individual taxpayers
- ▶ Business taxpayers
- ▶ Tax professionals
- ▶ Employees

▶ Interviews

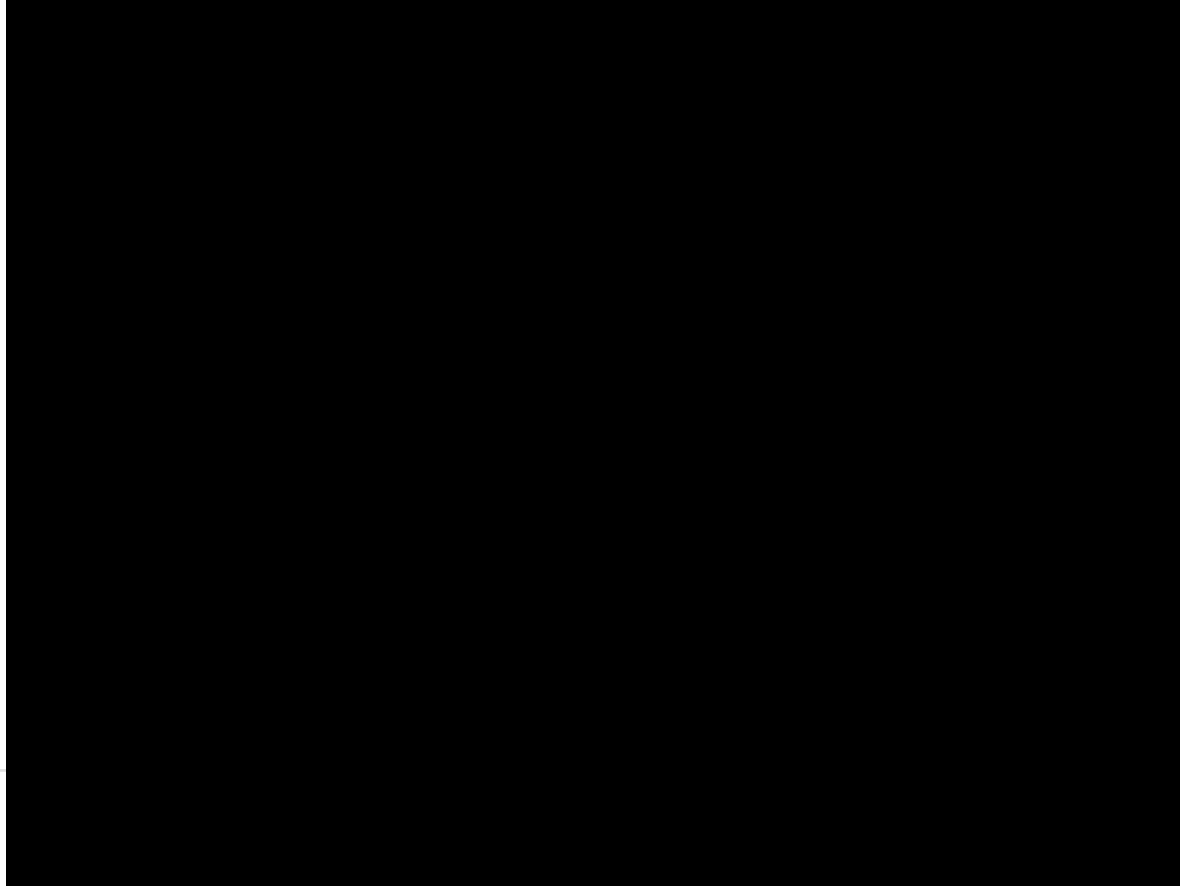
- ▶ Individual taxpayers
- ▶ Business taxpayers
- ▶ Tax professionals
- ▶ Employees

We used our existing site to establish a benchmark

- ▶ Baseline usability study on old design
 - ▶ 16 frequently-undertaken tasks
- ▶ Card sorting exercise on existing content
 - ▶ Users bundle site information however it makes sense to them
- ▶ Comparison of card sort results to current site navigation
- ▶ Review of basic analytics for old design



Eight participants tested in an in-person moderated test with 16 scenarios
Average success rate of 75% and average task duration of 93.21 seconds



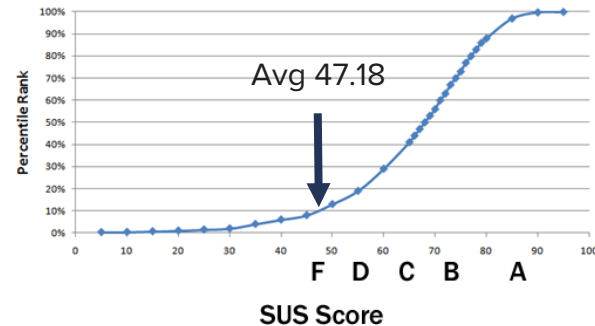
Baseline Usability Test Results

SUS Scores: All 8 participants tested completed the System Usability Scale (SUS) survey following each session

Average SUS score was 47.18. Indicating VA TAX has higher perceived usability than 10% of all sites tested*

Scores reflected domain knowledge.

- Tax Pros - 76.25 (B)
- Business Owners - 41.66 (F)
- Individuals – 33.33 (F)



*Source: [Measuring Usability With The System Usability Scale \(SUS\)](#)
Jeff Sauro • February 2, 2011

Note: SUS scores for this effort are mainly intended for measuring improvement, not comparisons.

User Research: Open Card Sort/Similarity Matrix

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Forms & Filing

Taxes, Credits, Exemptions, & Deductions

About AND/OR Policy

Payments, Penalties, Collections

Business Resources

Internal stakeholder interviews were also eye-opening

- ▶ Navigation and organization of content
- ▶ Too much content/too little white space – it's visually overwhelming
- ▶ Duplicate content: many topics appear in multiple places, and in some cases with contradictory information
- ▶ Search stinks
- ▶ Web apps are confusing – iFile vs. eForms vs. Fillable Forms and their respective capabilities
- ▶ Payments – we focus on bill vs. return payment vs. payment plan, and the taxpayer just wants to pay what they owe

Site Design

Start with your audience, and work backwards

We tied our site design to one of our strategic goals:

- ▶ **Improve the effectiveness of customer and partner interactions**
 - ▶ Expand, enhance, and promote self-service options
 - ▶ Simplify tax forms, instructions, and correspondence
- ▶ All of the aforementioned user research took place before a single element of the site was designed
- ▶ As our usability consultant kept repeating, “Every pixel has a purpose.”

When people come to our website, I want them to say, “I want to try to do business here.”

Craig Burns



We established four primary personas to represent our site users:

Individual

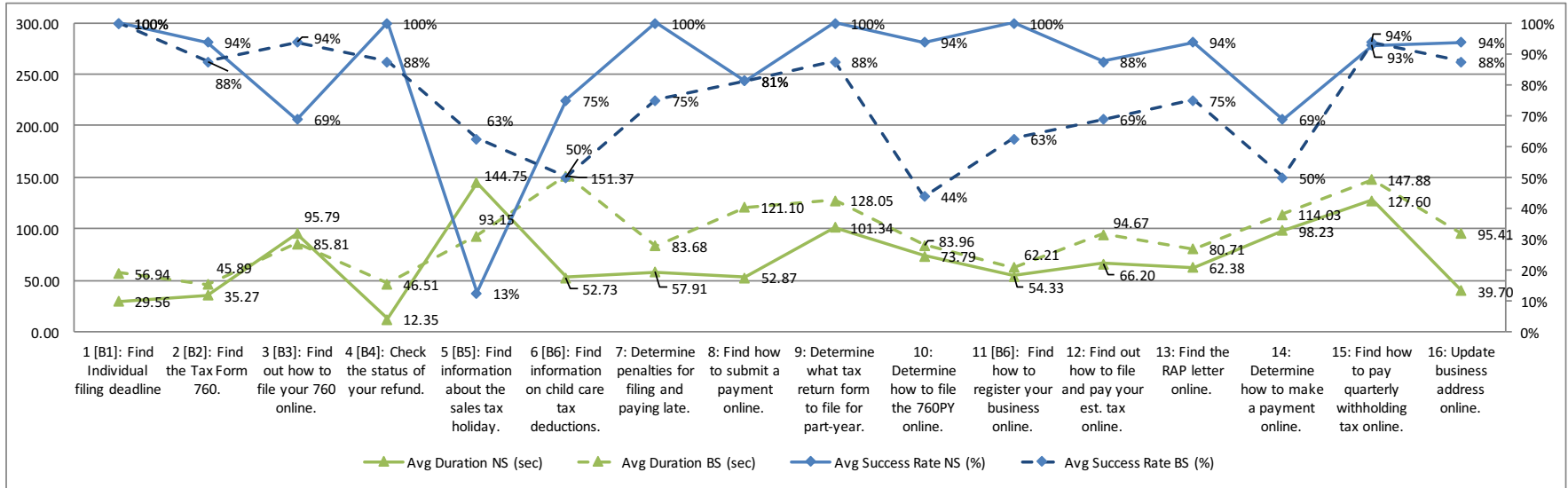
Business

Tax Professional

Government

After debating the merits of persona-based and task-based designs, and poring over the data, we decided to have our cake and eat it, too

- ▶ Task-based navigation for high-frequency tasks
- ▶ Persona-based entry points for:
 - ▶ Individual taxpayers
 - ▶ Business taxpayers
 - ▶ Tax professionals
- ▶ Government users can access their sites from a link in the footer on every page



Eight participants tested in an in-person moderated test with 16 scenarios

Average success rate of 85% (+13%) and average task duration of 69.05 seconds (-25.9%).

For successful tasks average task duration dropped 39% to 52.19 seconds.

Rebranding

Balancing reality with aspirations

While we were overhauling our website, we decided to update our logo, name treatment, and general branding as well

- ▶ The creative brief development focused on the positive experiences taxpayers have with our contact center and other agency staff
- ▶ We knew we wanted the taxpayer experience on the new website to mirror those positive experiences – but via self-service



The creative team set out to design a logo supporting our brand reality as:

- ▶ Fair and honest in our practices
- ▶ Considerate and respectful with our customers
- ▶ Responsible and accountable for our performance
- ▶ Innovative and efficient with our resources

From a tone standpoint, the team wanted to portray Virginia Tax as:

- ▶ Professional yet personable
- ▶ Careful, yet resourceful thinkers and planners
- ▶ Having the reliability of a well-run government institution, but being increasingly tech-savvy
- ▶ Dedicated to citizen privacy and to the security of their personal and financial data

Here are some of the options we considered:



And here is our new logo in several formats:



TAX Virginia Department of Taxation

Search our Site
Advanced Search | Site Map

Home

- Online Services
- Individuals
- Businesses
- Forms
- Site Tools

- FAQs
- Laws Rules And Decisions
- Taxpayer Rights
- Tax Credits
- Tax Professionals
- Facts & Figures
- Localities
- Contact Us

View Our Expenses



Offices Closed: The Virginia Department of Taxation will be closed Monday, October 10, for Columbus Day.

Review of Tax Return Letter

Did you receive this letter? Find out why and what steps you need to take [here](#).

[Pay My Bill](#) |
 [Electronic Filing Requirement](#) |
 [Where's My Refund?](#) |
 [Review of Tax Return Letter](#) |
 [Protect Your Identity](#) |
 [Walk-in Center Closed](#)




- About Us
- Working With Us
- News
 - Taxpayer Alerts - Updated August 16, 2016
 - Identity Theft
 - Our Organization
 -
 - Your Opinion
 - e-Alerts Sign-up
- Find out if your computer or browser is compatible with our online documents and applications.
- Read about our privacy and security policies.

Search our site (for forms, instructions, or anything else)

Our new homepage:

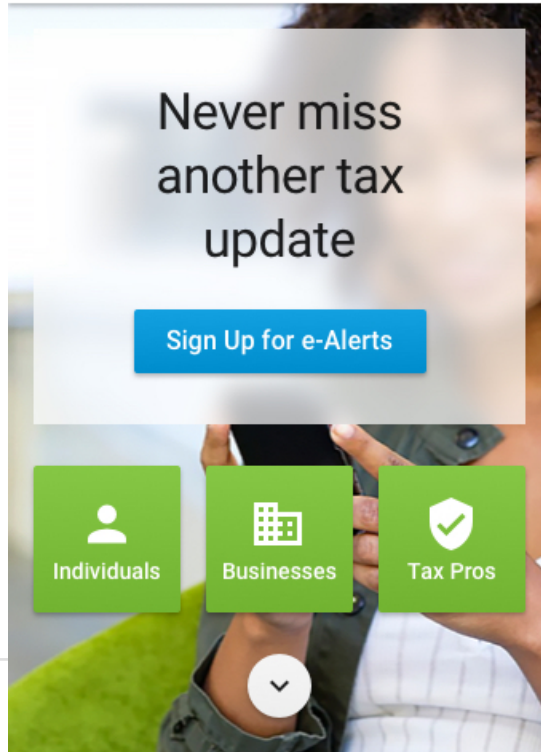
Never miss another tax update

Sign Up for e-Alerts

 Individuals >	 Businesses >	 Tax Professionals >
File Online >	Register my business >	Register as a Tax Preparer >
Check my refund status >	File my Sales & Use Tax >	Online Filing Options >
Make a Payment >	File my Withholding Tax >	Find Forms & Instructions >
Determine the forms I need >	Make a Payment >	Make a Payment >
Lookup my 1099-G >	Sign Up for an Online Account >	Tax Pro Resources >



 Search our site (for forms, etc.)



...and the responsive-design
mobile version

*feel free to grab your phone
and check it out:*

www.tax.virginia.gov

Content Revision

In-house experts told us what taxpayers need

We want to move to more “plain language” usage

- ▶ Tax content is complex
- ▶ Our in-house SMEs are great at fact-checking but not at plain language
- ▶ However, we do have resources who do a terrific job with plain language: our **call center employees**
- ▶ We loaned ~10 employees from our call center, specialty tax team, and compliance group to the communications team for 2 months
- ▶ They started with the most frequently accessed web info, rewriting it the way they’d explain it to a taxpayer on the phone

http://10.193.114.116:8080/content/refund-debit-cards

Refund Debit Cards | Virginia.gov

Virginia.gov Agencies | Governor Search Virginia.Gov

TAX Virginia Department of Taxation

Search our Site
Advanced Search | Site Map

Home > Individual > Where's My Refund? > Refund Debit Cards

Online Services Individuals Businesses Forms Site Tools

Virginia Tax Refund Debit Card

In 2015, the General Assembly approved language that **eliminated the debit card option** and now requires all tax refunds to be issued by direct deposit or by check.

Tax refunds previously issued on a MasterCard® debit card are still valid and taxpayers may continue to use those cards.

- [Getting Started](#)
- [How to use the Debit Card and Avoid Fees](#)
- [Unclaimed Property](#)
- [Contact Information](#)
- [Frequently Asked Questions](#)
- [Fee Schedule](#)

Useful Resources

- [Go Program® Website](#)
- [MoneyPass® ATM Locator](#)

FAQs
Laws Rules And Decisions
Taxpayer Rights
Tax Credits
Tax Professionals
Facts & Figures
Localities
Contact Us
View Our Expenses
eVA Transparency in Procurement

Getting Started

Activate Your Card

Before using your Refund Debit Card, you must activate it through the [Go Program®](#).

As part of the activation process, you will be asked to verify who you are by providing certain information from your tax return and to create a four-digit Personal Identification Number (PIN). The PIN you select will be known only to you and protects your card from being used by someone else. Do **not** write your PIN on your card and do **not share** it with anyone else.

To activate your card:

- Call the Go Program automated phone system at (855) 409-0580 and follow the prompts, or
- Visit the [Go Program® website](#). You will need to set up an online account first and then activate your card. These are two separate online processes.

Your Refund Amount

When you activate your card, you will be provided with the card balance. This was the amount of your income tax refund. Funds will be available immediately upon activating your card.

If the refund amount was not what you expected, you should have received a letter explaining why the amount is different. If you do not receive this letter, please [contact](#) the Virginia Department of Taxation (Department). Learn why your refund [may have been reduced](#).

Joint Filers

If you filed your tax return using the "Married Filing a Joint Return" status, you received two cards, one issued in each spouse's name. There is only **one card account**, and each card provides full access to the joint refund.

Each card must be independently activated before that card can be used to access the funds. The activation of a debit card by one spouse will not automatically activate the other spouse's card. All of the services and fees are **per card account** and not per card. It is not necessary to activate both cards. One spouse may access all the funds with their card.

[Top](#)

How to use the Debit Card and Avoid Fees

- Use your Refund Debit Card for **free** anywhere in the U.S. where MasterCard® cards are accepted to make purchases, pay a bill online, buy groceries, etc. You can also receive cash back at cash registers for no fee.
- Withdraw cash at any MasterCard® member bank. It does not have to be a bank that you have an account with; it can be any MasterCard® member bank. Look for the MasterCard® brand logo on the door. You are entitled to one free teller-assisted cash withdrawal but only at a MasterCard® member bank. Additional teller withdrawals will have a fee. To withdraw all your money, have your card balance with you when you visit the bank.
- Withdraw cash from any MoneyPass® ATM. You are entitled to **unlimited free** ATM withdrawal of funds from a MoneyPass® ATM per month. Subsequent ATM withdrawals within the same month will have a fee as will ATM withdrawals from a non-MoneyPass® ATM. Look for the MoneyPass® symbol on the ATM or use our MoneyPass® locator to find one near you. Please note that some ATM owners may impose their own convenience fee or surcharge. These fees are in addition to any Go Program® fees you may incur.
- Transfer funds from the debit card to your personal bank account. You are entitled to unlimited free transfers of funds from the debit card. This service is only available through the [Go Program® website](#) or by calling the Go Program® automated phone system at (855) 409-0580.
NOTE: Do not go to your bank to request this transfer. Please allow **2-3 days** for funds to be transferred.

Fees may apply to other transactions. Review the complete [schedule of fees](#) so that there are no surprises.

Refund Debit Card

[← Where's My Refund?](#)

Refund Debit Card

Sign up for email updates

Get Virginia tax filing reminders and tax news for individuals and businesses.

[Subscribe](#)

We no longer issue refunds on debit cards.

For tax years 2012 through 2014, we offered the option to receive refunds on a debit MasterCard® managed by [Go Program](#)®. At the end of the 2014 tax season, we stopped offering this option.

- If you activated your card and didn't use all of the money, the card may still be active. If you have questions about your card or your card account, visit the [Go Program](#)® website or call 855.409.0580.
- If you didn't activate your card, your funds have been turned over to the Virginia Department of the Treasury's Unclaimed Property Division. Visit their [website](#) or call 800.468.1088 to claim your refund.

Filing a 2012-2014 tax return now?

If you choose the *debit card* option on the return and you're still eligible to receive a refund, you'll receive a check instead.

We want to move to more “plain language” usage

- ▶ Getting the new content approved wasn't quick or easy
- ▶ There's still more work to do, and we weren't able to post all of the new content before we launched
- ▶ But our focus – minimizing the barriers between our taxpayers and their voluntary compliance with Virginia's tax laws – continues

Site Implementation

“You’re launching the new site WHEN?!”

We launched our new site on February 28, 2017

- ▶ We discussed the pros and cons of launching during filing season
- ▶ In the end, we decided that the benefits to our once-a-year website visitors outweighed the potential challenges to tax pros and others who knew the old site backwards and forwards
- ▶ As with all web launches, not everything went according to plan
- ▶ Despite extensive UAT with our call center teams, several search issues emerged in production that we hadn't seen when the site was in beta

Lessons Learned

- ▶ **You are not your users**
 - ▶ SMEs are great fact checkers but NOT great editors
- ▶ **Employees who regularly interact with taxpayers are a great resource, but actual taxpayers are a better resource**
 - ▶ Don't shortchange usability research as part of your project plan

▶ **Change is hard**

- ▶ Employees and others who use your site regularly aren't going to appreciate the improvements to navigation and usability – because they've become accustomed to workarounds with the existing site

▶ **Collaboration is critical**

- ▶ We moved our site from decentralized ownership with IT support to centralized ownership by the Communications team, and it worked because the IT and Communications groups collaborated effectively

Questions?

Thanks!

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