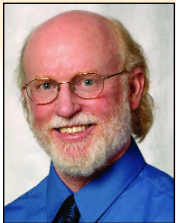# Make tax filing as painless as possible

HFI helps California Franchise Tax Board meet its #1 strategic goal: become customer-centered

Many people enjoy doing things online. But paying taxes—online or otherwise—is not something that most people look forward to.

In California, it falls upon the Franchise Tax Board (FTB) to make tax filing as easy as possible. Each year, FTB processes over 15 million state returns, generating $40 billion in revenue.

Over 32 million people visit FTB's website each year for tax information and forms (more than 24 million forms are downloaded anually). If people can't find what they're looking for online, they often phone the call center, which handles 2.3 million inquiries yearly.

"HFI's expert team took our site to the next level of usability. We completely redesigned our public portal. Prototypes of our new design were so well received by California's State CIO and other California state agencies that our approach has become the new model to consider following for redesigns.

Given the significant increase in site usability, I view this investment as money well spent that provides a tangible return and significant impact for California citizens and our business partners."

— Russ Reece
Portal Business Manager
California Franchise Tax Board

Challenges

- The website must be usable for a wide range of people
- Most people are infrequent users (except tax professionals)
- Users are intimidated by tax jargon
- The website cannot be changed during tax season

FTB suspected that much of its site was underutilized—either because people couldn't find information or didn't know *what* to look for. FTB was especially eager to increase the usage of CalFile, its online filing feature.

At the start of a major redesign, HFI performed an expert review and conducted usability testing on both the existing website and a new prototype. By getting usability analysis and recommendations early in the redesign process, FTB minimized the cost of implementing changes.

Findings & Recommendations

The results of both the expert review and usability test underscored FTB's concerns:

- Content was hard to understand, especially for novice users (test subjects failed tasks 49% of the time)
- Navigation was difficult to predict and learn (76% weren't sure they were even on the FTB site)
- Participants did not understand online filing options (63% couldn't figure out if they were eligible to CalFile)

Human Factors International (HFI) helps customers create websites, applications, and intranets that are intuitive and easy to use. For more information on how HFI's expert analysis can identify your site's strengths and weaknesses, visit www.humanfactors.com.

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

Content: Online content must be more streamlined than traditional printed pamphlets. If users have a simple question, they get frustrated having to download and skim an entire brochure.

FTB had a particular challenge with jargon. Terms like "tax amnesty," "innocent spouse," or "9000/9000R" left users bewildered, especially as menu links.

HFI's recommendations:
- Prioritize content based on frequency of use (or importance, such as CalFile)
- Use pictures to improve comprehension
- Place content under a logical label/category
- Use Web-specific copy to support quick decision making

Navigation: Users found the home page cluttered and overwhelming. They tended to notice only the "audience-specific" entry points (circled in red on "before" screenshot at right) and failed to explore other relevant menus.

HFI's recommendations:
- Reduce the number of menus
- Create a consistent menu system on every page
- Provide "you-are-here" feedback
- Organize information by topic rather than audience (since the needs of each audience overlap)

Branding & Consistency: All California government websites used the same header, look and feel. As a result, many users weren't sure if they were on the FTB site or another California government site altogether. Making matters worse, many pages on the FTB site had no branding whatsoever ("orphaned pages").

HFI's recommendation: Design a standard "wrapper" to clearly indicate that the user is on the FTB site.

Next Steps

FTB sees usability as a way to demonstrate that they are responding to public needs, especially with such a visible redesign. FTB executives are now eager to institutionalize usability. To this end, the FTB Web team took HFI's training program to earn their Certified Usability Analyst™ credentials.

"Everyone who attended HFI's executive presentation was impressed and blown away by their knowledge and professionalism. HFI offered critique without being critical... it was a real eye-opener. Dr. Eric Schaffer's book, *Institutionalization of Usability: A Step-by-Step Guide*, had a lot to do with getting the ball rolling."

— Diana Faramarzi
Web Usability Specialist
California Franchise Tax Board

FTB home page—before

FTB home page—after

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