

# **IRS Tax Map**

**Electronic Research tool for Tax Law Assistors**

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# Agenda

- **Introduction**
- **Michel - Integration - Topic Map Approach**
- **Usability testing**

# Big Picture

- **Problem - navigating wide range of technical information**
- **Needed - establishment of a single entry point**

# Project Purpose

- **Develop a model to demonstrate:**

**Benefits of semantic integration**

**Research by subject**

**Single entry point access**

# How Tax Map Works

- **Tax Map enables research by subject**
- **Navigate to subject by search or by scrolling**
- **Go to the topic (home) page for the subject**

# IRS Tax Map

**Tax Topic Map - Microsoft Internet Explorer**

File Edit View Favorites Tools Help

Back Forward Stop Refresh Home Search Favorites History Mail Print Edit

**IRS TAX MAP**

Search All Topics:  **GO**

Search Help  
Navigation Help

Integrated Indexes

Main Topics  
A B C D E F G H I  
J K L M N O P Q R  
S T U V W X Y Z #

Form Topics

Browse by:

Publication  
FAQ  
Tele-Tax Topic

Feedback  
Suggest a Topic  
Comments

Search all 8000 topics

Find key "entry point" topics

Find form and schedule topics

Use Table of Contents

IRS TAX MAP

Tax Related Publications

IRS TAX Forms

IRS  
Department of the Treasury  
Internal Revenue Service  
www.irs.gov

2002

Done Local intranet



# Topic Page

**Due dates - Microsoft Internet Explorer**

File Edit View Favorites Tools Help

Back Forward Stop Refresh Home Search Favorites History Mail Print Edit

**TOPIC: Due dates**  
Synonym: Due Date/Deadline **Equivalent topic**

**Publications**

**Publication 17: Your Federal Income Tax>Filing Information [Use:2002]**  
When Do I Have To File? April 15, 2003, is the due date for filing your 2002 income tax return if you ...

**Publication 17: Your Federal Income Tax>Filing Information [Use:2002]**  
Extensions of Time To File You may be able to get an extension of time to file your return. Special ...

**Questions**

**FAQ - Electronic Filing (e-file) and TeleFile>Due Dates & Extension Dates for e-file**  
I'm in the process of getting a name and social security number mismatch error corrected with the Social Security Administration. In the meantime, what can I do to avoid a penalty notice for not filing my tax return on time?

**Related Topic Links**

- > Due dates>Nonqualified fishermen
- > Due dates>Qualified fishermen
- > Estimated tax>Farmer due dates
- > Returns>Qualified farmer due dates
- > Saturday, Sunday, holiday rule

**IRS TAX MAP**

scope

publication

abstract

Search All Topics:

Search Help

Integrated Indexes

Main Topics

A B C D E F G H I  
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# Semantic Integration and Topic Maps

- **Information available about subjects is grouped in a single place.**
- **Subjects can have diverse names**
- **Topic Maps standard: a first step towards semantic integration.**



# Integrating Information

- **Merge 95 Taxpayer Information Pubs**
- **Merge Publications with FAQ and Tax Topics**
- **Topics and Associations result from combination of automatic processing and manual work.**

# Integration Workshops

- **Purpose: Review what has been acquired by previous processing and improve navigation and relevance**
- **Tax Experts.**
- **Representatives of users.**
- **Operations performed: add, delete, rename, relate, prioritize.**

# Usability Lab Test

- **Test effectiveness of research by subject**
- **Access clarity of navigation**
- **Access learning curve**
- **Access accessibility for visually impaired**
- **Obtain user feedback**

# Usability Lab Test - Method

- **5 participants**
- **Survey prior to test**
- **20 minutes training**
- **Five Scenarios**
- **Post survey and 10 minute interview**

# Usability Lab Test



# Lab - Issue Assessment

- **34 Issues**
- **Created categories and priorities**



# Field Tests

- **One day field test - Dallas - 32 Assistors**
- **Two week field test - Boston - 28 Assistors**

# Test Results

- **Research by subject intuitive**
- **Preferred by Less experienced employees**
- **Positively received by assistors**

# Next Steps

- **Gather statistically valid data**
- **Integrate Probe and Response Guide**
- **Initial test incorporating Guide “as is”**
- **Propose revised electronic version**

# Probe and Response

1-A Who Must File - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Back Forward Stop Refresh Home Search Favorites History Mail Print Edit

Address http://core.publish.no.irs.gov/topicmap/pr/1-A\_who\_must\_file-template.htm Go

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Form Topics

Browse by:  
Publication  
FAQ  
Tele-Tax Topic  
[Probe & Response](#)

Feedback  
Suggest a Topic

< Previous Page: 904-Asistencia Contributiva Para Residentes de Puerto Rico  
> Next Page: 1-B Which Form To Use  
Use < > to find additional instances of index items.

## 1-A Who Must File

< Who must file >

Step	Determine	Action	Reason/ Reference
1.	Tax Year	Go to <a href="#">Step 2.</a>	Prior year filing requirement amounts are different.
2.	Whether U.S. citizen or resident alien  <b>IF</b> married: <ul style="list-style-type: none"> <li>Is spouse a US Citizen or resident alien?</li> </ul>	<b>IF</b> no and not trained in nonresident tax law: <ul style="list-style-type: none"> <li>Transfer to appropriate application.</li> </ul> <b>IF</b> yes: <ul style="list-style-type: none"> <li>Go to <a href="#">Step 3.</a></li> </ul>	Filing requirements are different for non-resident aliens. <b>Publication 519, Chapter 2, Nonresident Alien or Resident Alien.</b>
3.	Types and amount	Go to all Step(s)	Including income from

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