

Assignment #1: Naïve Usability Assessment

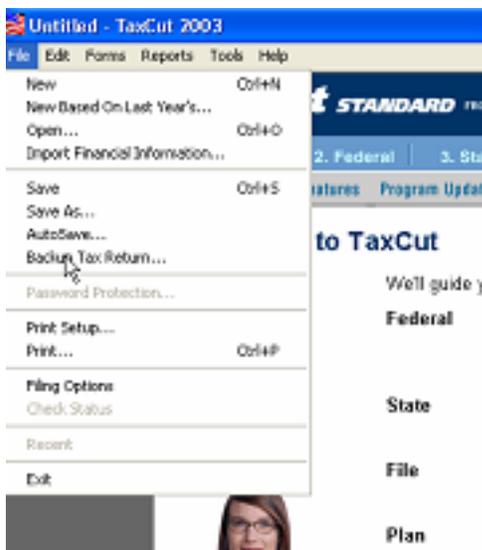
Patrick Riley
INFOSYS 214
Professor Van House

I decided that for this project, I would take this opportunity to kill two birds with one stone; for assignment 1 I'd file my federal income taxes online using tax software, in particular TaxCut 2003 Standard. Through my interfacing with TaxCut, I was able to finish my taxes in a record 2 hours (I'm a little on the meticulous side, otherwise I might have finished even faster! With the TaxCut UI, I never was hopelessly stuck, there were moments when the software was so smooth that it made doing taxes almost enjoyable, and it did not prevent me from doing what I needed to do. However, there were also some issues I had with the interface.

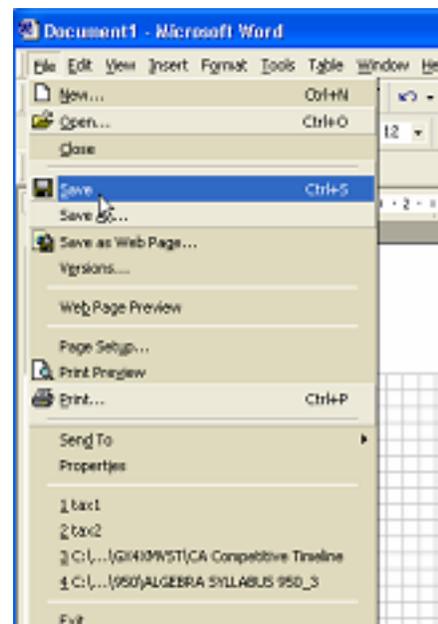
There were moments where I had to adjust to the way the system worked. I was flummoxed when the generally consistent menu bar system did not "color" the entry, and I thought either the menus in TaxCut were non-functional due to the system, or the software wasn't working correctly due to a memory allocation problem (see image below). After learning that neither was the case, I just had to get used to the fact that what I was about to select in a menu was not highlighted. It may seem like a minor issue, but I've never used a program that did that before.

Since my previous interface for doing taxes was paper, it also took some time to get used to not using a form. Instead, this sleek, clean interface was simply taking what I inputted into its various questions into the form. Since I'm extremely careful about doing my taxes, I found it difficult to simply trust that TaxCut was filling in the right amounts where I thought they should be on the form. However, this issue seems to have been thought of by the TaxCut UI designers, as they had a "show form" button where a user could see the form below as they were answering the question. For whatever reason, this gave me less anxiety about the accuracy of TaxCut's functionality from my interface to the actual tax form.

There were some more heated times when I felt like throwing TaxCut in my virtual Windows Recycling Bin. Although the auto-W2 function was certainly designed to save the user's time, I was greatly inconvenienced when it didn't find UC Berkeley as a partnered employee and then froze when it asked if it could check online to see if they had been added recently. I had to start from the beginning of the software order again. This also made me distrust the interface system, and I decided in the interest of not having to do this all over again a third time, I will not EVER choose an extra time-saving feature such as auto-W2 again with TaxCut.

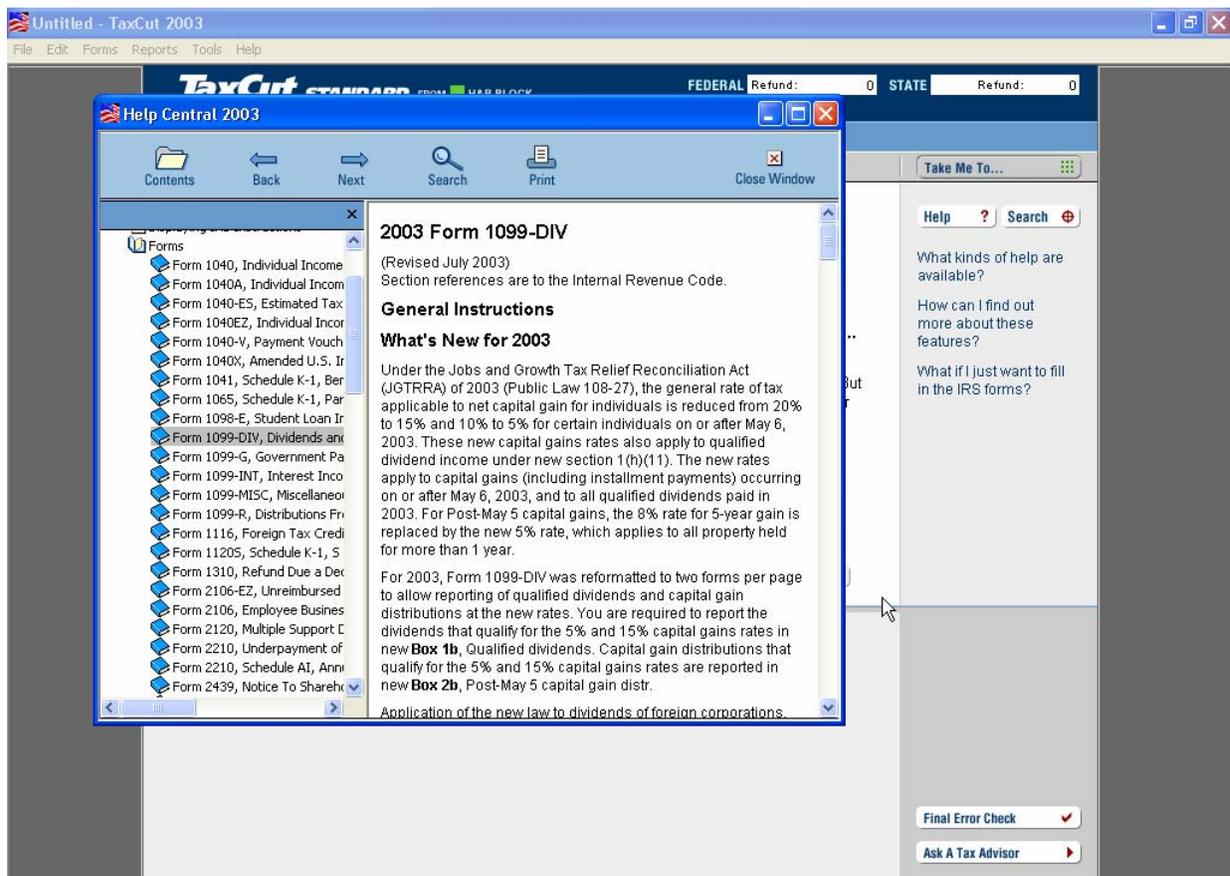


I was confused by the unusual menu system interaction in TaxCut.



I also felt uncomfortable with TaxCut when it asked me (once I was done with my federal taxes and entered the California questions) “Will you be attaching federal tax forms to your California tax form?” If someone knows anything about taxes, you need to send in your 1040 and possibly other schedules with your California tax return, but for some reason the interface was asking ME if I’ll be attaching them? Doesn’t TaxCut know if I should be attaching these forms or not? And what exactly does that question mean, given that this program eventually leads to an e-filing of my taxes... “will [I] be attaching federal tax forms to [my] California tax form?” Eventually, when you finish the California sections, it indicates that you still have to print out your federal forms for mailing with the California tax return (which was also done with e-file!). This kind of confusion makes me question my purchase of this cd-rom...methinks I should have just went to a CPA for \$50 more.

While navigating through my tax inputs, the “next” and “back” buttons did take me to the pages I expected to go to, and always saved my data when navigating in both directions. The Q&A section was helpful and booted up immediately when I clicked on a linked term I didn’t understand (unlike the help tools in most Microsoft products which take 5 seconds or longer to boot up). It also didn’t reformat my screen space, (again, unlike Microsoft programs) which made me more comfortable about the stability of the program and made it easier to close the “help” section without mistakingly closing the entire TaxCut program (see image below). I would also find myself asking, “When am I going to be done with this part?” and the interface did provide a user-friendly tracking system to indicate progress in a section. It also kept a running tally of my federal income tax deduction while I zipped through the sections.



When I was finished with my federal tax questions, TaxCut runs through a review to see if I had done anything that they believed would most likely trigger an IRS audit. When the review found 5 warning, I referred back the appropriate documents in my tax file to verify the accuracy of my inputs. I found my reaction to this “flagging” system interesting. On one hand, I know I knew my own unique tax issues better than an automated software title designed for the masses. When the interface indicated with a warning symbol that my charitable contributions were far greater than the average deduction, I thought, “Well, maybe I should just reduce it to what the program says is the average, even though I had the documents to prove it! I decided a few bucks off my reward was better than an IRS audit, so I went with the software’s recommendation. I also considered that the makers of the software were H&R Block, a trusted tax consulting company that likely knew a lot more than I did about filing taxes. Other issues the software flagged were my exceedingly high meal/entertainment expenses, even though I also had the receipts for those. Again, the warnings convinced me to be on the safe side and reduce my deduction.

 **Warning 3 of 5**

Employee business expenses exceed 30% of AGI. Make sure this is correct.

Found On: Schedule A - Itemized Deductions

Make any changes in the form below.

Note: You don't have to clear all the Warning messages before filing your return.



 **Error 2 of 8**

Inconsistency: When we released TaxCut, Form 2106 was not yet finalized. A program update containing the final form will be available in mid-January. Please update your program at that time, then come back to Error Check so we can review your return again. To update your program, close Error Check and select Update TaxCut from the Tools menu.

Found On: Form 2106 - Employee Business Expenses

You must fix this problem before filing.

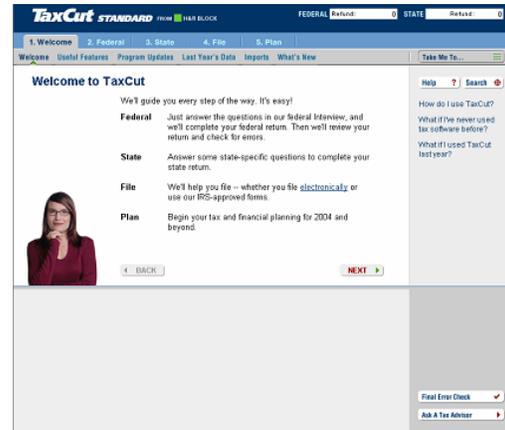
 





I don't care what they say about Microsoft; I love my new Microsoft Wireless Desktop System. This wireless keyboard and mouse interface allows me to move around my room to type in different positions, and gives me a chance to stretch out when I need it. All I did was plug the receiver unit into my USB port, and immediately all the buttons do EXACTLY what they say or look like they are going to do. The "+ -" buttons adjust the volume, the "Mail" key opens up my Outlook Express account with one press, my "Web/Home" button opens my web software and the button that says "My Documents" and has a symbol close to the Windows "My Documents" folder?... You guessed it, it opens the computer's "My Document" folder. The keys are much larger than my laptop keys, so it's easy to comfortably write these pages of my report, there is no lag time between when I type on the keyboard and when it shows up on the computer screen, and it seems to really enhance the way I use my laptop.

I did, however, have to get used to the fact that I didn't really need a mouse anymore. Ergonomically, this setup is far better for me than typing on my laptop keyboard and using my mouse, but it still takes resistance to not take one hand off the keyboard to use the mouse when I have an urge to move the cursor. But now I'm quite comfortable using this keyboard to switch between active programs, tabbing through webforms, and using the many Fkey features on the keyboard. Sometimes I'll move the keyboard "out of range" from the receiver, and suddenly none of the keys work, but all I have to do is hit a large button on the receiver and in seconds the signal is reconnected. Because of its amazingly quick setup and fast usability qualities, I think it might be one of the best investments I've made (below, of course, applying and matriculating at SIMS).



I discovered many interesting attitudes I had when using these two interfaces. With the TaxCut software, I found that I had a tendency to automatically trust the advice of the tax software, even though it was an automated batch of 1s and 0s, not a certified tax expert. I also decided to do my taxes the old fashioned way and found a strikingly different result for a refund. When I used to sleek software, I was satisfied with the alerts and warnings given by the review step and generally reduced my deductions and credit claims when the program flagged the amount as a potential trigger for increased IRS scrutiny. If it wasn't an interface made by H&R Block, and instead was, for example, a newspaper article on potentially increased IRS scrutiny, I probably would not have changed my result. On the other hand, considering that this program was interfacing with something as serious as my federal tax return, and considering that it crashed once and asked me a totally ridiculous and quite obvious question about attaching my federal return to my state return, I am still debating whether or not I'm actually going to use the results of my taxes from TaxCut or go to a CPA.

I also found out just how impatient I was. If something takes longer than 5 seconds, then something must be broken, and I generally get upset after 5 seconds. This exercise also made me appreciate how smooth some Microsoft products are, like my wireless keyboard. Even though it's using a complicated system of IR signals from the keyboard to the receiver and then using complicated software to determine what the computer's appropriate actions should be for a certain keyboard action, it works flawlessly and consistently. I trust my Microsoft keyboard and believe perhaps Microsoft might be on the right track with some of its newer products (due to my happiness with this keyboard).

Untitled - TaxCut 2003

File Edit Forms Reports Tools Help

New Ctrl+N
 New Based On Last Year's...
 Open... Ctrl+O
 Import Financial Information...
 Save Ctrl+S
 Save As...
 AutoSave...
 Backup Tax Return...
 Password Protection...
 Print Setup...
 Print... Ctrl+P
 Filing Options
 Check Status
 Recent
 Exit

STANDARD FROM H&R BLOCK

2. Federal 3. State

atures Program Updates Last Y

to TaxCut

We'll guide you every

Federal Just answe
 we'll com
 return an

State Answer s
 state retu

File We'll help
 use our li

Plan Begin you
 beyond.

BACK

Document1 - Microsoft Word

File Edit View Insert Format Tools Table Window Help Acrobat

New... Ctrl+N
 Open... Ctrl+O
 Close
 Save Ctrl+S
 Save As...
 Save as Web Page...
 Versions...
 Web Page Preview
 Page Setup...
 Print Preview
 Print... Ctrl+P
 Send To
 Properties
 1 tax1
 2 tax2
 3 C:\... \GX4XWVST\CA Competitive Timeline
 4 C:\... \950\ALGEBRA SYLLABUS 950_3
 Exit

Assignment #1

Page 1 Sec 1 1/1 At 8.3cm Ln 13 Col 1

start

Help Central 2003

Contents

Forms

- Form 1040, Indi
- Form 1040A, Inc
- Form 1040-ES, E
- Form 1040EZ, Ir
- Form 1040-V, Pa
- Form 1040X, Arr
- Form 1041, Sche
- Form 1065, Sche
- Form 1098-E, St
- Form 1099-DIV,
- Form 1099-G, G
- Form 1099-INT,
- Form 1099-MISC
- Form 1099-R, Di
- Form 1116, Fore
- Form 1120S, Sch
- Form 1310, Refu
- Form 2106-EZ, U
- Form 2106, Emp
- Form 2120, Mult
- Form 2210, Und
- Form 2210, Sche
- Form 2439, Noti

Untitled - TaxCut 2003

File Edit Forms Reports Tools Help

TaxCut STANDARD FROM H&R BLOCK

FEDERAL Refund: 0 STATE

1. Welcome 2. Federal 3. State 4. File 5. Plan

Welcome Useful Features Program Updates Last Year's Data Imports What's New

Welcome to TaxCut

We'll guide you every step of the way. It's easy!

Federal Just answer the questions in our federal interview, and we'll complete your federal return. Then we'll review your return and check for errors.

State Answer some state-specific questions to complete your state return.

File We'll help you file - whether you file electronically or use our IRS-approved forms.

Plan Begin your tax and financial planning for 2004 and beyond.

BACK NEXT

MyTaxes - TaxCut 2003

File Edit Forms Reports Tools Help

TaxCut

1. Welcome 2.

Welcome Useful Features

Useful Features

As

FA

Fr

Te

bu

Fi

if

start

W-2 Import Not Available (Univ of

We don't see your employer in our list of employers. We are adding employers all the time, so it may not be on the list since the last time we released the list.

If you want to update the list, click 'Update'. If you don't see your employer, click 'Skip' to enter this W-2 manually.

When we released TaxCut, Form 2106 was not yet finalized. A final form containing the final form will be available in mid-January. If you have your program at that time, then come back to Error Check so we can update your return again. To update your program, close Error Check and restart TaxCut from the Tools menu.

2106 - Employee Business Expenses

Check for this problem before filing.

◀ BACK

Update

Next ▶

⚠ Warning 3 of 5

Employee business expenses exceed 30% of AGI. Make sure you are deducting the correct amount.

Found On: Schedule A - Itemized Deductions

Make any changes in the form below.

Note: You don't have to clear all the Warning messages before you can return.

er

umber co

urity num

