



By Kristina Yin

Surveys, Surveys, Surveys

8/29/2022



About Me



Hello! I'm Kristina!

Design Fellow @ IRS (she/her)

I recently graduated Santa Clara University with a BS in Computer Science & Engineering with a minor in Studio Art. I am interested in the intersection of art and technology, and human-computer interaction. My passion is to build equitable digital spaces and services.

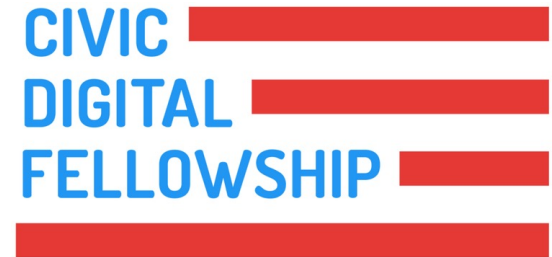


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Civic Digital Fellowship

The Civic Digital Fellowship is a first-of-its-kind model that encourages **early-career technologists** to explore careers in public service through a **10-week internship**.



As part of the 2022 cohort, accepted with a 10% acceptance rate, I engaged with members of the civic tech community through mentorship, speaker events, and presentations of various organizations like USDS, 18F, etc.

I applied to the Fellowship with an interest in driving **innovation for social change** in the government.



Taxpayer Behavioral Lab



The **Taxpayer Behavioral Lab**, which is part of the Research, Applied Analytics, and Statistics (RAAS) division of the IRS, consists of social scientists, statisticians, tax law specialists, etc. who conduct research into understanding the **burden incurred by taxpayers in order meet their federal tax-reporting responsibilities**. They research cost-effective ways to help taxpayers **overcome barriers in claiming the tax benefits** that they are entitled to and to **encourage tax compliance**. The lab's robust **Burden Models** are used to inform tax policy, regulatory guidance, and program improvement.



Main Challenge

The Brief



The Fellow will create and update existing **Taxpayer Burden Survey** paper instruments as well as create a new, visually pleasing **user-friendly web survey template** to be used across all Taxpayer Burden Survey web surveys.

The Impact



My work supports the initiative to transition taxpayer burdens survey work from contractors to RAAS, which will substantially **reduce the cost of the research** as well as **shorten turnaround time** from project start through final data collection.



Objectives

Teaching Qualtrics



Gift Transfer Tax Burden Survey



Questions Library



IRS Survey Themes



Code Documentation





Teaching Qualtrics



Qualtrics Training

- Led “Introduction to Qualtrics” event on 7/11 for license holders and secondary support staff
- Assisted the brand administrators with setting up the licenses and allocating the response pool among all IRS research divisions

Quick Start Guide

- Compiled list of Qualtrics self-help resources
- Qualtrics handguide ~78 pages
- Starting guide for successor VIS staff detailing how to use resources to set up burden surveys
- Assisted third-party contractors' format soon-to-be launched surveys using custom code



Gift Transfer Tax Burden Survey



Which of the following recordkeeping systems did you use in Tax Year 2021 to keep track of federal gift transfer tax-related records?

Please check all that apply.

- ☒ General recordkeeping software products such as Excel, IBM Notes, OpenOffice
- ☒ A checking or investment account from which the gifts or charitable donations are paid
- ☐ A separate hard-copy ledger to record gifts and charitable donations
- ☐ Any other tax-related recordkeeping system during Tax Year 2021

Please describe:

Welcome to the IRS Gift Transfer Tax Burden Survey

Thank you for taking the time to provide us feedback. Please answer all questions with reference to the federal gift transfer tax return filed in Tax Year 2021. At any time you can leave the survey and come back to complete it. The survey will pick up from the last page you completed.

If you need assistance, please email us at raas.irs.taxpayer.surveys@irs.gov or call 202-803-9833. You can find a Frequently Asked Questions (FAQ) document and copy of the full survey in links below. These links will be available throughout the survey.

Privacy Act and Paperwork Reduction Act Notice for Gift Transfer Tax Taxpayer Burden Model Data Collection

Our authority for requesting information with this survey is 5 U.S.C. § 301, and 26 U.S.C. 7801, 7803, and 7805 and the Paperwork Reduction Act. The information you provide allows the IRS to analyze the role of taxpayer burden in tax administration. This information is also used to fulfill the IRS's statutory obligations to the Office of Management and Budget and Congress for information required by the Paperwork Reduction Act, and to provide tax policy analysis support to the Office of Tax Analysis at the Department of the Treasury. This information will also help us to better understand taxpayer needs and burden reduction opportunities collected will be shared with IRS staff, but your responses will be used for research and aggregate reporting purposes and not be used for other non-statistical or non-research purposes such as direct enforcement activities. The information you provide will be protected as required by law. We estimate that it will take 10 to 15 minutes to complete this survey, including the reviewing instructions, searching existing data sources, gathering and maintaining the data needed, and completing and reviewing the collection of information. Providing the information is voluntary; not providing all or part of the information requested impact on you but may reduce our ability to address taxpayer concerns regarding paperwork reduction. We may not con

The Gift Transfer Tax Burden Survey, (almost) ready to launched, will act as a guide and template for all future burden surveys.



Question Library



I built a library of **common question types** for burden surveys (each with specific formatting, validation, logic, and code added) that any TBL member can easily access and copy into new surveys.

How much time did you spend on tax-related activities?

Which of the following methods did you use to prepare your...

How much money did you spend to comply for federal tax...

the most difficult complying with tax...

Please provide suggestions for how the IRS could impro...

What record-keeping systems did you use to prepare your federal...

How much time spend on tax-activities



Themes



XM Admin

Reports Users User Types Groups Group Types Coupon Codes Data Privacy Themes Organization Settings

Themes + [Icon]

Default Theme

IRS Theme 1

IRS Theme 2

IRS Theme 3

Name

Theme Name

IRS Theme 1

General

Style

Logo

Background

Icons

Delete

0% 100%

Overall, how satisfied are you with this product?

☐ Extremely satisfied

☒ Neither satisfied nor dissatisfied

☐ Extremely dissatisfied



IRS Theme 1



IRS Theme 2



IRS Theme 3

I created three different Qualtrics **themes** with IRS branding, following institution design standards.



Code Documentation



I compiled and documented all the **code snippets** I wrote in HTML, CSS, and JavaScript, into one document with detailed comments about their definition, functionality, and implementation.

In total, this represents **~150 lines of code**, not including comments and experiments that ended not being used in the final survey version.

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var v1 = jQuery(this).a
jQuery("[id*="+v1+"~T
} else {
// if Other option is uns
var v1 = jQuery(this).a
jQuery("[id*="+v1+"~T
jQuery("[id*="+v1+"~T
}
});
// account for changes in re
jQuery("#" + QID + " .Select
jQuery("#" + QID + " input
if(jQuery(this).prop("ch
// if Other option is
var v1 = jQuery(this)
jQuery("[id*="+v1+"
} else {
// if Other option is u
var v1 = jQuery(this)
jQuery("[id*="+v1+"
jQuery("[id*="+v1+"
}
}
});
});
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Side Projects

Reformatting Letters

Adjusted communication letters for a new printing pipeline



Automated Form Fill

Investigated ways to automate form fill using existing services



Visualization of Data

Learned ways to depict relationship between income, tax return, and EITC credit





Lessons Learned

- Research & Survey Building
- Section 508
- Following Brand Guidelines
- Working in the Government
- Stuff Happens
- Think Outside the Box



Next Steps

Work



Resources I made will be used for **years to come**, including by other research divisions across the IRS as they adopt Qualtrics.

Personal



After the summer, I will be applying to **graduate school** for a master's degree in Human-Computer Interaction. I really hope to return to public service in the future!



Thank you!

Brenda, for being such an incredibly supportive and welcoming manager

Scott and **Kris**, for offering great direction and guidance

Andrew, for leading the CDF program in the IRS and offering thoughtful insight about governmental work

Linda, for being my NextGen mentor and taking the time to check-in and offering help if needed

Akua and **Haren**, for taking the time to talk about their careers in the IRS and answering my questions

The entire **TBL team** for welcoming me with open arms!