

IRS – W&I

FOCUS GROUP MODERATOR’S GUIDE **Automated Underreporter Customer Satisfaction Survey** *(Notes to the moderator are in italics)*

Overview

Hello, I’m Elaine Lowitz from Pacific Consulting Group. I will be moderating our discussion today. The topic we’ll be discussing is your satisfaction with the IRS and your feelings about the AUR service. Each of you was asked to participate because you received correspondence or a phone call from the AUR function staff within the last 60 days. The overall goal of the research is to provide information that will help the IRS provide better service to customers like you. Specifically, we are working with the IRS to develop a questionnaire for customers of AUR. In the near future, a customer satisfaction survey will be offered to customers to help the IRS improve its services. Your input is very important for establishing the areas of the process that need improvement. This is your opportunity to have input and to tell the IRS what your experiences have been and to make recommendations for change.

First, I would like to thank all of you for calling in today. Our discussion will take about one hour. We would like to know your real attitudes and feelings, so please be as open and frank with us as you can. We would like for you to think about your opinions of the IRS with regard to your interactions with them and not your opinions regarding tax laws specifically. We are recording this session, and we have some IRS personnel listening in with us, but please keep in mind that our focus here is on your experiences and opinions, not on your individual identities.

Introductions

Before we get started, let’s introduce ourselves. Please tell us your first name, what state you live in, and whether or not you prepare your own taxes.

Interactions

Describe the nature of your contact with the AUR function and what action you took upon receiving that correspondence from them.

Probes

- *Was the notice clear to you in describing what it was about and what action was expected from you?*
- *What other contact did you have with the IRS?*
- *How would you rate the professionalism of the IRS?*
- *How consistent and accurate was the information you received?*
- *How fairly do you feel you were treated?*

Resolution Process

Whether you resolved your issue, or are still in the process of resolving your issue, I'd like to understand how you felt about the length of the overall process.

Probes

- *How long (in number of days) did the process take from the time you contacted the AUR function to the time it took to resolve your case?*
- *Was the process longer or shorter than expected?*
- *What were your expectations on length of process?*
- *Of those who felt your issue wasn't resolved, can you explain why not?*

Overall satisfaction

On a scale of 1 to 5, with 1 being not at all satisfied, and 5 being very satisfied, overall, how satisfied are each of you with the service that you received from the IRS' AUR function.

Wrap-up

Finally, do you have any additional advice for the IRS regarding how the **function** process can serve you better?

Those are all the questions that I have for this session. I want to thank you and the IRS wants to thank you, for participating in this discussion. You'll each be receiving your \$50 token of our appreciation in the mail within two weeks.