

Attachment A

e-help Desk Focus Group Screener's Guide

BACKGROUND

The purpose of the e-help Desk Focus Group is to gather feedback on current help desk operations and obtain information on how the IRS can improve e-help Desk services. The IRS seeks the participation of e-help Desk customers who have contacted the help desk for technical assistance with IRS electronic products.

RECRUITMENT GOAL

20 per Location

PARTICIPATION TARGET

10 Participants per Location

LOCATIONS

Atlanta, GA

Chicago, IL

Las Vegas, NV

New York, NY

SCRIPT

Hi, my name is _____. I'm recruiting participants for the e-help Desk Focus Group.

Have you ever contacted the IRS e-help Desk for Support?

If No: *Thank you for your time, however we really need people that have used the e-help Desk to participate in the focus groups. If you would like to find out more information about e-help, please visit the e-IRS Room.*

If Yes: *Great. Would you be interested in participating in IRS focus group to determine how we can improve e-help Desk services?*

If No: *Thank you. Don't forget to visit the e-IRS Room. Enjoy the Tax Forum.*

If Yes: *Thank you for participating. Provide participant with appointment card (be sure to inform participant of date and time).*

**e-help Desk Focus Group
2007 Tax Forum Moderator's Guide**

SUPPLIES

- Flipchart Stand
- Flipchart Paper
- Markers
- Name Tents
- Tape Recorder
- Appointment Cards
- Incentive Products
for Participants

INTRODUCTIONS

Welcome to the 2007 e-help Desk Focus Group. My name is _____ I am an IRS employee and I will serve as the focus group moderator for today's session. This is _____ also an IRS employee, she/he will scribe for us today.

NOTE: RECORD TOTAL NUMBER OF PARTICIPANTS

So tell us a little bit about yourself (profession, hometown, etc.) and why you decided to participate in the e-help Desk Focus Group.

WHAT ARE FOCUS GROUPS?

*Has anyone ever participated in a focus group? **ASK FOR A SHOW OF HANDS/RECORD NUMBER***

A focus group is simply a group discussion with the purpose of obtaining a diversity of views, ideas, and opinions on a particular topic. IRS uses information from focus groups to make decisions on new products and services and ways to improve our current products and services.

This purpose of this focus group session is to obtain information on the IRS e-help Desk. We will begin today's session with a general discussion about help desks and then move on to more specific questions about the IRS e-help Desk. But, before we begin, I would like to ask everyone to place their cell phone on vibrate or silent mode. Thank you.

You'll see me referring to this outline during our session. The outline includes all issues I need to raise with the group, and helps me keep the discussion on track. It is important that we cover all of the issues. Therefore, I may at times have to break off the conversation in order to move on to another area in the guide.

DISCLOSURES

1. **Confidentiality.** Everything that you say here will be kept strictly confidential. We will use first names only and names will not be used in the report. You will remain anonymous to the IRS and are free to tell me what you think.
2. **Voluntary Participation.** Your participation in this group is entirely voluntary. You do not have to answer any questions that you do not wish to answer; but keep in mind, there are no wrong answers.
3. **Time.** I will be watching our time and directing our conversation. We will be here for about 1 hour. A formal break has not been scheduled but if you need to stretch or go to the restroom please feel free to do so. But please come back quickly. Your comments are very important to us.

Attachment B

4. **OMB.** We are required by law to report to you the OMB control number for this public information request. That number is **XXXX-XXXX**.
5. **Thanks.** Thank you for arranging your schedule to be here for this session today. We appreciate your time and your contributions to this study.

The following are ground rules about how the discussion should work:

GROUND RULES

1. Please talk one at a time in a voice as loud as mine.
2. Avoid side conversations with your neighbors.
3. We would like to hear from everyone in the course of the discussion, but you don't have to answer every question.
4. Feel free to respond directly to someone who has made a point. You don't have to address your comments to me.
5. Say what is true for you. We are not looking for consensus opinions, but are expecting to hear diverse perspectives.
6. We will observe the no smoking rule during this session.
7. As I mentioned earlier, I am an employee of IRS. However, I am not a tax expert and I am unable to assist you with specific tax issues. So please refrain from specific tax issue discussions or questions during this session.

GENERAL HELP DESK QUESTIONS

1. Can you tell me the first thing that comes to mind when you hear the words "Help Desk?"
ALLOW DISCUSSION WHILE WRITING RESPONSES ON FLIPCHART/RECORD RESPONSES
2. If you were responsible for creating a help desk for your company, what would it look like? What would be most important? What would be least important? **ALLOW DISCUSSION WHILE WRITING RESPONSES ON FLIPCHART/RECORD RESPONSES**

E-HELP DESK QUESTIONS

Now we would like to get some feedback on your experience with the IRS e-help Desk.

1. How many of you have contacted the e-help Desk for assistance? **ASK FOR A SHOW OF HANDS/ RECORD RESPONSES**
Probing Questions (ALLOW DISCUSSION/ RECORD RESPONSES)

Attachment B

- a. Reasons for contacting the e-help Desk. – What made you contact the e-help Desk? For which products?
- b. Method – When you contacted the e-help Desk what was your method of contact? Phone, e-mail, or paper?
 - For those of you who do not contact the e-help Desk, what do you normally do to resolve e-help Desk type questions?
- c. Convenience – Are the existing hours of operation convenient for you? What would be your preferred hours of operation?

Current Hours of Operations: M – F 6:30 a.m. to 6:00 p.m. Central Time

- d. Frequency of contacts – On average, how often do you contact the e-help Desk?
 - e. Professionalism – When you contacted the e-help Desk how would you rate the level of professionalism, knowledge, and courtesy?
 - f. Accuracy – Are your issues being resolved accurately? How confident are you with the answers you receive?
 - g. Timeliness – For those of you who have contacted the e-help Desk, was your issue resolved in a timely manner?
 - h. Program Improvements – Can you provide any suggestions on how we might improve e-help Desk operations? Would any of you be interested in submitting help desk questions via e-mail, web forms, or chat if those options were available to you?
2. How many of you have visited the irs.gov website? **ASK FOR A SHOW OF HANDS/ RECORD RESPONSES**
 3. What is your impression of the irs.gov web site? **ALLOW DISCUSSION/RECORD RESPONSES**
 4. How often do you access the irs.gov web site? **ALLOW DISCUSSION/RECORD RESPONSES**
 5. How many of you have visited the irs.gov e-file and e-services web pages? **ASK FOR A SHOW OF HANDS/ RECORD RESPONSES** Was the information on those pages useful? Was the information you were seeking easy to find? **ALLOW DISCUSSION/RECORD RESPONSES**
 6. What do you think about the idea of the IRS creating an e-help Desk web page on irs.gov for people to troubleshoot their own issues? What type of information would you like to see there? **ALLOW DISCUSSION/ RECORD RESPONSES**

CLOSING

Attachment B

*We are getting close to the end of our time. Before we wrap up our session, I would like to give you the opportunity to add anything else that is on your mind regarding e-help Desk services. **CAPTURE FEEDBACK/PROBE***

PRA Statement & OMB Control Number

The Paperwork Reduction Act requires that the IRS display an OMB control number on all public information requests along with the address where you can send comments regarding this study. The OMB Control Number for this study is 1545-1349. If you have any comments regarding this study, please write to: IRS, Tax Products Coordinating Committee, SE:W:CAR:MP:T:T:SP, 1111 Constitution Avenue, NW, Washington, DC 20224.

Thank you for taking time out of your schedule to participating in the e-help Desk 2007 Focus Group. We appreciate your candidness and will use your responses in our continuing efforts to improve e-help Desk operations. Than