

**IRS E-File Taxpayer Focus Groups
Screener Guide**

- *Four 90 minute focus groups total, all in Washington D.. Recruit 13 for 10 to show for each group.*
 - o *Tuesday February 24th - 6PM*
 - o *Tuesday February 24th - 8PM*
 - o *Wednesday February 25th - 6PM,*
 - o *Wednesday February 25th - 8PM*

Use focus group facility lists. We would like a mix of:

- *gender*
- *self-filer vs non self filer*
- *self-preparers and non-self preparers*

Hello, my name is _____ and I work for _____. We are a marketing research company that is working with the IRS to schedule people to participate in a group discussion. We are offering \$75 cash for each person's participation and will also be serving food at the event.

Your identity will not be shared with the IRS or other agency, nor will we be discussing your specific tax issues. Do you have a few minutes to answer a couple of questions? Your participation is voluntary, but your help on this project would be very much appreciated. *[Proceed if respondent agrees].*

1. Assuming you meet the qualifications, would you be available to come to the discussion location on *[Recruiter, specify date and time for slots that need to be filled]*

- Yes.....1
- No.....2 *[Thank and end call]*

I have a few questions to help us get a mix of people for this session.

2. Did you or someone else in your household have a Federal Income tax return filed either this year or last year?

- Yes, myself.....1
- Yes, someone else...2 *[Ask to speak with that individual, and begin intro again]*
- No.....3 *[Thank and end call]*
- Not sure/Refused....4 *[Thank and end call]*

3. Who was the main person who prepared your taxes? Was it:

You (yourself)

Someone else (include paid preparer like accountant, H&R Block, or unpaid preparer such as friend or relative)
[recruit for a mix]

4. What tax form did you file most recently? Was it a

- Short form 1040EZ - did not itemize deductions
- Short form 1040A - claimed the standard deduction
- Long form 1040 WITHOUT other forms or schedules – claimed the standard deduction
- Long form 1040, WITH other forms or schedules - itemized deductions
- [Read if necessary]* Long form, don't remember if had other forms/schedules
- [Read if necessary]* Short form, don't remember which one
- [Do not read]* Don't know, someone else prepared or filed it

5. How was your most recent federal tax return filed? Was it *[Read list as necessary]*?

- Filed by regular mail.....1 *[If someone says they prepared electronically and printed and mailed in their return, include them in filed by regular mail category]*
- Filed electronically (e-file)2
- Not sure, filed by someone else..3 *[Thank and end call]*
- [recruit a mix of mail vs. e-file]*

5. Which of the following categories best describes your annual household income before taxes? *[Read list as necessary]*?

- Less than \$10,000.....1
- \$10,000 to less than \$15,000.....2
- \$15,000 to less than \$25,000.....3
- \$25,000 to less than \$35,000.....4
- \$35,000 to less than \$50,000.....5
- \$50,000 to less than \$75,000.....6
- \$75,000 to less than \$100,000.....7
- \$100,000 to less than \$150,000....8
- \$150,000 to less than \$200,000.....9
- \$200,000 to less than \$1 million...10
- \$1 million or more.....11
- Don't Know/Refused.....12

6. Record Gender (Don't not ask this question)

- Male.....1
- Female.....2
- [recruit a mix if possible]*

Our facility location is (INSERT FACILITY ADDRESS). Our phone number is (INSERT FACILITY PHONE NUMBER). Do you have any questions about this discussion or about how to get to our facility? *[Provide directions and public transportation information if requested]*. We would like to give you a reminder call prior to the focus group.

[Record name from list and best phone number:]

Name _____
Phone number _____

Again, you'll be receiving \$75 that is taxable and reportable on your 2008 federal income tax return.

The Paperwork Reduction Act required that IRS provide an OMB Control Number on all approved public information requests. That number is OMB 1545-1349. Also, if you like, I can give you a name and address where you can send comments and questions regarding this process or suggestions for making it simpler.

[Provide the following information only if respondent asks for address:]

Internal Revenue Service
Tax Products Coordinating Committee, Room #IR-6406
1111 Constitution Avenue, NW
Washington, DC 20224

Thank you and have a nice day. We look forward to meeting with you on (DATE) at (TIME)

**IRS E-File Taxpayer Focus Groups
Reminder Call Script**

Hello, I'd like to speak with (NAME OF PARTICIPANT). This is (NAME OF CALLER) from Pacific Consulting Group calling to confirm your participation in a group discussion on (DATE) at (TIME) about your experience with IRS outreach and education services, at (LOCATION).

Do you have any questions? Thank you and have a nice day.

IRS E-File Taxpayer Focus Groups Moderator's Guide

Introductions:

- Moderator introduces his/her name and Pacific Consulting Group (PCG).
 - PCG's involvement with IRS' customer satisfaction studies.
 - Overall project objective to improve/maintain tax filing services

- Explain the purpose of today's group discussion:
 - To help construct a questionnaire that will be sent to a random sample of taxpayers nationwide
 - To explore how taxes are prepared and filed
 - To identify key attributes that drive tax filing
 - To walk through flow of proposed questionnaire structure

- PCG's role as a facilitator, not a recommender or tax expert.
 - There are no right or wrong answers; we just want your perceptions, opinions, and suggestions.

- Have respondents introduce themselves and say a few words about their taxes and interactions with the IRS.

Tax Preparation Method

Let's start off by talking about your tax preparation method.

- Do you prepare your own tax returns or use a preparer?
 - If preparer:
 - What type of preparer?
 - What is the primary reason that you chose a preparer?

Tax Filing Method

Now, let's discuss how you filed your taxes.

For each of you, please tell me what tax form you filed and how you filed it - by paper using regular or express mail, e-filed, or prepared electronically but filed a paper return (V-coders)? *[Conduct roundtable and tally number]*

Paper file _____ E-File _____ V-Code_____

For each method, what was your experience with this filing method?

Attributes impacting Tax Filing Choice

- As I mentioned earlier, the thrust of this discussion is to help the IRS understand what motivates people to paper-file vs. e-file and to encourage more e-filing. With that,

let's shift the discussion to what attributes drive your decision most in determining whether or not to e-file.

- What key factors drive your decision to e-file or not? [Record on whiteboard or flipchart]

Probes:

- Monetary Incentives
- Availability: Payment deadline/Waiting time for refund
- Return preparation time
- Chance of getting it done right = Speed of Notification of Simple Errors on Return
- Paying the least amount of taxes under the law
- Return Prep Time
- Recordkeeping

Questionnaire Flow

- Your feedback will help us to design a questionnaire that will be completed by close to 2,000 taxpayers. We have a draft questionnaire flow and would like to review it with you.

[Review questionnaire flow and record comments on flip chart]

- Is the (conjoint) task understandable?
- Are the definitions of terms (training) sufficient?
- How many tasks can you manage within each scenario?

Recommendations

- Is there anything else you wish to add to the discussion?

Wrap-up/Thanks for participating