

IRS W&I Injured Spouse
Phone Focus Group Moderator's Guide - DRAFT
(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 Injured Spouse service. Each of you was asked to participate because you filed an Injured Spouse claim. 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 update a questionnaire similar to one you've completed recently. 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.

Service Interactions

Now I'd like to ask each one of you to briefly describe your experience with the process. Think from the time you thought to file a claim to actually getting a final response from the IRS about your allocation.

[Moderator: Gather responses in a roundtable fashion]

Probes

- *How easy was it to find out about the Injured Spouse program?*
- *Describe your contact with the IRS (mail, phone, how it went)?*
- *How would you rate the professionalism of the IRS staff?*
- *How would you rate knowledge of IRS staff?*
- *How consistent and accurate was the information you received?*
- *Describe other interactions*

Now, I'm going to open the discussion up to the group. I'd like to understand how you felt about the length of the overall process.

Probes

- *Was the process longer or shorter than expected?*
- *What were your expectations on length of process?*

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' Injured Spouse group.

[Moderator: Gather responses in a roundtable fashion]

Factors Driving Overall Satisfaction

Next, I'd like to find out from you what factors drove your overall satisfaction with the Injured Spouse claim process. Think of a restaurant where your overall satisfaction depends on a number of criteria, including food quality, service, price, wait staff service, ambience, etc. I'd like you to take a few minutes to think about what factors come to mind when you're rating satisfaction with the Injured Spouse process – what things are important to you? So, I'll pause for a minute before asking each one of you for your thoughts.

[Moderator: pause then gather responses in a roundtable fashion]

Improvement Areas

The final topic of discussion is improvement areas. This is a two-part question for the group. The first part is thinking back on your experience, what could you have done to improve the Injured Spouse claim process?

What do you think the IRS could have done to improve service of the Injured Spouse claim process?

Finally, do you have any additional advice for the IRS regarding how the IRS AUR group 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. PCG will be sending a \$50 token of our appreciation in the mail within two weeks.