

OMB Clearance Package

I. Introduction

Background Overview – In 2005, Congress asked that the IRS better determine the needs and preferences of the taxpayers it serves. The five-year Taxpayer Assistance Blueprint (TAB) is the response to that request. Annual TAB report provides information on how the IRS better understands taxpayers, and how this understanding is translated into better taxpayer service. To help fulfill the mission of the TAB, the Seamless Taxpayer Experience group (STEG), Wage & Investment Division of the IRS, works to better understand barriers to seamless service from the taxpayer perspective.

Objectives of Data Collection – To identify taxpayer service improvement opportunities within the IRS service environment, in particular service areas, issues, channels relevant to the work of service intermediaries.

II. Methodology

Sample Design – Sample will be actively recruited from Tax forum attendees using a recruitment table with incentive items.

Data collection date(s)-

June, 22-24

July, 13-15

July, 27-29

August, 10-12

August, 31- September 2

Data to be collected – Comments, both notes and verbatim recordings, from tax professionals on how the IRS can improve service it provides tax professionals – from the perspective of the tax professional

How data will be used - The data will be taken, and analyzed in light of operational requirement and practices to generate potential areas for service improvement.

How data will be analyzed – As largely unstructured data, focus group results will be reviewed and organized into discrete ideas. After classification according to service task and service channel, the data will be reviewed with subject matter experts to determine the feasibility and dependencies of improvement opportunities

Who is conducting research - Members of the Seamless Taxpayer Experience Group, all of whom have received formal training in focus group facilitation.

Locations -

Atlanta, GA.

Chicago, IL

Orlando, FL
New York, NY
Las Vegas, NV
San Diego, CA

Recruitment efforts – Recruitment will take place beginning the Monday before the tax forum up until the time of the focus groups. Incentive items and a sign up table will be employed, along with floor excursions to solicit participation.

Methods to maximize response rates - To increase participation, appointment cards will be provided to focus group participants when recruited.

Test structure/design – Focus groups with moderated discussion on difficulties with taxpayer service experienced by tax professionals.

Efforts not to duplicate research – No other research into pain points with IRS service as experienced by tax professionals will be conducted at the IRS tax forums

III. Participant Criteria – Participants must be a tax professional, must attend an IRS tax forum, must be willing to participate in a forum discussion

IV. Privacy, Security, Disclosure, Anonymity – All information will be collected without any personal identifying information, participants will be advised to maintain anonymity

V. Burden Hours – 8-10 participants, 2 sessions per tax forum, 1.5 hour per session, 6 tax forums

8 participants x 2 sessions x 1.5 hours per session x 6 forums = 144 hours

10 participants x 2 sessions x 1.5 hours per session x 6 forums = 180 hours

Total burden will be between 144 and 180 hours

VI. Attachments - Moderator's Guide

Additional Information – Cost Estimate

Expenses (3 people x 4 days/3 nights)

Travel per location

<u>Location</u>	<u>Dates</u>	<u>Est. Travel Expenses</u>
Atlanta, GA	June 22 – 24*	\$ 300.00
Chicago, IL	July 13 – 15	\$ 3,944.00
Orlando, FL	July 27 – 29	\$ 2,700.00
New York, NY	Aug 10 – 12*	\$ 5,540.00
Las Vegas, NV	Aug 24 – 26*	\$ 3,497.00
San Diego, CA	Aug 31 – Sep 2	\$ 4,506.00
Total Travel Expense		\$ 20,487.00
Outreach Trinkets/Give-a ways		\$ 3,300.00
Total Travel & Trinkets only		\$23,787.00

Paperwork Reduction Act (PRA) Statement:

The Paperwork Reduction Act requires that the IRS display an OMB control number on all public information requests. The OMB Control Number for this study is 1545-1349. Also, if you have any comments regarding the time estimates associated with this study or suggestions on making this process simpler, please write to the:

Internal Revenue Service

Tax Products Coordinating Committee

SE:W:CAR:MP:T:T:SP

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