

TIGTA FOCUS GROUPS – IRS FORMS AND INSTRUCTIONS

Attachment I

Treasury Inspector General for Tax Administration IRS Tax Forum Focus Groups

Recruiting Dialogue for Participation in TIGTA Focus Groups

Hello my name is _____ (Recruiter Name) _____. I work for the Treasury Inspector General for Tax Administration. You may have attended one of our presentations at a past IRS Tax Forum. We are a Federal Agency that has oversight of the Internal Revenue Service. Do you have a minute I could speak with you?

We are hoping to get feedback from tax preparation professionals who are familiar with IRS tax products, specifically IRS tax forms and instructions. We are conducting focus groups this week here at the IRS Tax Forum to discuss possible improvements that the IRS could make to tax forms and instructions that would make the preparation and filing process easier and result in less errors made on the returns. We would like to get your opinion and your ideas on what the IRS could do to simplify their forms and instructions to help reduce the number of errors taxpayers make when they prepare their returns.

These focus groups will be held each day this week during the lunch hour and will last approximately 45 minutes. We will not be asking you to provide specific information regarding your company or the clients you serve. We simply will seek your perspective on some changes we think that could be made to the forms and instructions and also get your opinion on other changes you think that could be made that would make the instructions or forms easier to follow.

Screening Questions

Q1. Would you be willing to participate in one of our focus groups this week?

- Yes -> continue
- No -> [Thank them for their time.]

Q2. Great, which day this week would work out best for you?

- Tuesday
- Wednesday
- Thursday

[Based on the day selected, inform them of the start time and the specific location. Also, we may have to assign them to a specific day depending on the slots available.]

Q3. Would it be alright if I left you with my business card and this sticker that you could attach to your Forum booklet as a reminder of the time and place of the focus

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group? It also includes my name and phone number that you can call if you have additional questions or if something comes up and you are unable to attend. [Sticker will include organization's name (TIGTA), TIGTA representative's name, cell phone number and date, time and location of focus group.]

Q4. Would you mind if I took down your name and cell phone number so that I could send you a text message as a reminder of the focus group.

Name: _____

Cell Phone: _____

We are only inviting a small number of people, so it is very important that you notify us as soon as possible if for some reason you are unable to participate. Please call the number on the sticker if this should happen. We look forward to speaking to you [reiterate the time and place]. Thank you.

I'm glad that you will be able to join us!

Reminder Message:

Just a friendly reminder. We have you scheduled to participate in our focus group today at [time] in room ##. We'll look forward to seeing you there. Thanks for your participation."

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Attachment II

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TIGTA Focus Group Agenda

- I. Introduction of Moderator(s)
- II. Ground Rules [2 minutes]
 - A. You have been asked here to offer your views and opinions; we would encourage your participation.
 - B. Please speak one at a time.
 - C. Please keep side conversations to a minimum.
 - D. There are no right or wrong answers, however honest and forthright responses are appreciated.
 - E. It is OK to be critical. If you dislike something or disagree with something that is said, you're free to state it.
 - F. The group does not need to reach consensus, differing opinions are OK.
 - G. All your comments and information will be completely confidential and your name will not be associated with the focus group or research in any way. So please feel free to be candid in your responses.
 - H. 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, 1111 Constitution Ave. NW, Washington, DC 20224.
- III. Warm-up [3 minutes]

To get us started, let's simply introduce ourselves and provide relevant background information including what organization or practice you are representing and where you are from.

- IV. Brief Explanation of the Focus Group Purpose/Introduction of Topic [5 minutes]

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The information that is gathered today will be compiled, summarized, and presented to the IRS. We also anticipate making recommendations to them based on the information we collect today that will help reduce the number of errors taxpayers and preparers make on certain areas of their returns. Our discussion today will be in two parts:

First, we will discuss with you the list of errors that are commonly and sometimes repeatedly made by taxpayers when they fill out their tax returns. We will also review copies of the forms and instructions associated with those errors. In addition, TIGTA has made changes to those forms and instructions that we believe can help reduce the number of errors made. We will discuss those changes and would appreciate your honest feedback as to whether those changes would be beneficial or if there are other changes that could be made that would simplify or clarify the process.

Second, we would like to open it up and have general discussion of common problems or issues that you experience with IRS forms and instructions and would be interested in your suggested changes or recommendations.

V. SEGMENT #1 - Common Errors and Potential Solutions [25 minutes]

During this segment, review common errors with focus group participants and portions of the forms and instructions associated with those errors.

- As you review the errors and the portions of the returns and instructions associated with those errors, are there changes that could be made to the forms and instructions that could reduce the probability of taxpayers making errors?

Review the revised forms and instructions with the focus group participants and gather opinions as to whether the modifications and changes would be beneficial and ultimately reduce errors.

- As you review the revised forms and instructions, would the suggested changes benefit taxpayers by simplifying or clarifying the computation or explanation and would it ultimately reduce the number of errors that are made?
- Are there other changes that could be made that would reduce the number of errors taxpayers are making in those particular areas?
- Are there changes that could be made to forms and instructions that could specifically benefit senior taxpayers?

VI. SEGMENT #2 – Open Discussion [10 minutes]

During this segment, ask open questions to identify problems that focus group participants are experiencing with forms and instructions and seek possible solutions.

- What problems are you experiencing with any of the IRS forms or

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instructions?

- What changes could be made to the forms and instructions that would simplify or clarify the return preparing process?

VII. Close

Thanks for your time.