

**ATTACHMENT A**  
**Focus Group – On Line Tools for Small Business Tax Practitioners on**  
**IRS.gov Español Web Site**

**2008 Tax Forum Focus Groups**  
 **Screener’s Guide**

Hello, my name is \_\_\_\_\_. I work for the IRS and I am recruiting tax professionals to participate in a focus group. May I please speak to you for a few minutes?

The IRS is working to provide products and services, including outreach and education, to Limited English Proficient (LEP) taxpayers. Working towards this goal, the IRS has developed a web site to assist Spanish speaking LEP taxpayers understand their tax responsibility.

The purpose of this study is to seek comments and suggestions from tax professionals who are familiar with the Español web site on the content available for Small Business Owners. We would like you to identify what additional online tools are needed on IRS.gov/Español in order to meet the needs of the Small Business limited English proficient taxpayers.

If you are interested in participating, I need to ask you some qualifying questions.

These questions should take no more than three minutes of your time. If you are eligible and wish to participate, the discussion will take approximately two hours.

If you would like, I can give you a name and address where you can send comments and questions regarding this time estimate. We are required by law to report to you the Office of Management and Budget (OMB) control number for this public information request. That number is OMB# **1545-1349**. Your participation is voluntary.

***Read only if respondent asks for address where to send comments***

Send comments to:

IRS Products Coordinating Committee  
Western Areas Distribution Center  
Rancho Cordova, CA 95743-0001

Are you interested in participating? *(If yes, continue with questions)*

**1. Which of the following best describes the type of returns you prepare most frequently?**

[ ] Business .....Yes

Individual Only .....Thank them and let them go.  
If they ask, tell them we are only looking for preparers who service Business taxpayers because the product we are testing is for Business taxpayers.

**2. Because this web site is geared towards Spanish speaking individuals, we would like to obtain feedback from tax professionals whose client base is mostly Spanish speaking. Are the majority of your clients Spanish speaking?**

Yes.....Go to Question #3  
 No..... Thank them and let them go. If they ask, tell them we are only looking for preparers who service Spanish speaking individuals because the product we are testing is for Business Spanish-speaking taxpayers.

**3. Are you bilingual? Do you speak Spanish?**

Yes..... Go to Question #4  
 No..... Thank them and let them go. If they ask, tell them we are only looking for preparers who service Spanish speaking individuals because the product we are testing is for Business Spanish speaking taxpayers.

**4. Have you used the Español web site?**

Yes.....Extend invitation to participate  
 No..... Thank them and let them go. If they ask tell them we are only looking for preparers who have used the Español web site.

When invitation to participate is extended, please restate that they will be participating with other tax professionals.

After securing respondent agreement to participate, record information below and give the participant a reminder card.

**Participant's First Name (first name only)** \_\_\_\_\_

**Reminder Card**

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Focus Group: Evaluation of the IRS Español Web Site

Date of Focus Group Session \_\_\_\_\_

Time of Focus Group Session \_\_\_\_\_

Location of Focus Group Session \_\_\_\_\_

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Recruiters: Please use this box to tally the attempts to recruit practitioners. At the completion of the project, we must report to OMB the number of requests or attempts to recruit practitioners for the focus group. After recruiting is completed, give the tally to the moderator of your focus group. The moderator will total the recruit attempts at this forum.

**TALLY ATTEMPTS TO RECRUIT PRACTITIONERS FOR FOCUS GROUP**

**ATTACHMENT B**  
**Moderator's Guide**  
**Focus Group - Online Tools for Small Business Tax Practitioners**

## INTRODUCTION

Hello! My name is \_\_\_\_\_ and I am a focus group moderator for the Internal Revenue Service. \_\_\_\_\_ will be taking notes of the session. I am conducting a series of focus group interviews with tax professionals who prepare tax returns for Spanish speaking clients. I am talking with tax professionals like yourselves at all the 2008 IRS Tax Forums. The purpose of this focus group is to get your input on what additional On line tools are needed on IRS.gov Español in order to meet the needs of the Small Business limited English proficient taxpayers?

*As I stated before, this discussion is being held with tax professionals in different cities across the country.*

*We appreciate you taking the time to participate in this discussion. Your comments are very important to us and will be used to make any necessary improvements to the web site.*

### **WHAT ARE FOCUS GROUPS?**

Has anyone here ever participated in a focus group? **(Ask for a show of hands. State number for recording.)**

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.

### **WHAT IS A MODERATOR?**

My job as moderator is to:

- Help guide the flow of conversation
- Make sure everyone's comments are heard
- Ensure that questions about various aspects of the topic are covered

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 on 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 2 hours. A formal break has not been scheduled but if you need to stretch, go to the restroom, or walk around a little, please feel free to do so. But please come back quickly. Your comments are very important to us.
4. **OMB.** We are required by law to report to you the OMB control number for this public information request. That number is
5. **Audio taping.** Because it is hard to listen and capture all your comments on notes, we are audio taping this session so I can write an accurate report later. Your name will not be used in the report; but the tapes will help me to remember the valuable input you give me to share with the Service. **(Note to moderator: if anyone voices concern, also mention to them that the note taker can't write as fast they speak nor can they remember everything after traveling to the 6 different cities over a three month period.)**
6. **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.

## **Group Introductions**

Icebreaker:

Please introduce yourself to the group by telling us:

- Your first name
- What city you practice in
- What motivated you to come talk to the IRS today

**ATTACHMENT C**  
**“Focus Group - On Line Tools for Small Business Tax Practitioners”**

**Note to moderator: Thank everyone for coming again and restate purpose below:**

**Before we get started, I'd like to remind all of you that the purpose of this focus group is to get your input on what additional on-line tools you would like to see on IRS.gov Español to meet the needs of your Small Business Taxpayers. We really value your opinion at the IRS. We believe that obtaining your opinion will help us offer more on line applications for both you and your small business taxpayer.**

**We are soliciting your opinions as practitioners because most of these taxpayers are clients and/or potential clients to you. Since you interact with them on a one to one basis you can truly assist in identifying additional on-line tools that will meet the needs of your Small Business Taxpayers.**

**General Questions**

1. Through our screening process, we know that you have used the IRS.gov Español web site. We would like to ask you some questions about the website. But first to refresh your memory I'd like to share some screenshots of the page with you.

**Moderator Task:** Show webpage screenshots of the Español landing page

- **Probe: What information on this page is useful for you to assist your Small Business clients in complying with their tax responsibility?**
  - **Which topics or links are most useful for you? least useful?**
  - **Is there enough information within the links/topics? If not, what should be added?**
  - **Should additional information/topics be added?**

**On-Line Topics**

2. Have you used the Interactive On-line Topics currently on the left navigational bar on the Left side of the screen of the Spanish website?

To refresh your memory I am handing out a screen shot of the left navigational bar and the tools currently on

**Moderator Task:** Show screenshot of Left nav. Screen: EITC Assistant, Electronic Options, Free File, Where is My Refund, Withholding Calculator

**Note: Address each tool/application separately.**

- **Probe**
    - **How often do you use ( insert name of specific tool)?**
    - **What do you like about (insert name of the application)?**
    - **What don't you like about the (insert name of application)?**
    - **Are there any issues with the language?**
    - **What do you think about the font size, graphics, etc?**
    - **Overall, which applications do you use the most? the least?**
3. I am going to give you a list of additional tools currently available on IRS.gov in English only

**(Distribute list of the other Online Tools)** Give participants a few minutes to look over the list.

**On Line Employer Identification Number - (EIN)** - Receive your EIN within minutes without picking up the phone or mailing/faxing a paper Form SS-4.

**Electronic Federal Tax Payment System - (EFTPS)** - Pay your federal taxes electronically through EFTPS, a tax payment system provided free by the U.S. Department of Treasury. Available on-line or by phone 24/7.

**Find an Authorized E-file Provider (For individuals)** - Search for an Authorized *e-file* Provider in your area who can electronically file your tax return

**E-Services for Tax Professionals** - Approved IRS business partners (such as e-filing tax professionals and payers) can register and use e-Services to conduct business electronically with the IRS.

**On- Line Payment Agreement** - If you have a tax liability you can't completely pay today, you may be eligible to apply online for an installment/payment agreement to pay over time. To qualify, you must owe less than \$25,000 and be able to pay the entire liability within 60 months.

**Sales Tax Deduction Calculator** - **Determine** the amount of optional state and local sales tax you can claim on Schedule A of Form 1040.

- **Probe**
  - **Are you familiar with any of these Tools?**
  - **Which of these Tools do you currently use to assist your Spanish Small Business Taxpayers?**
  - **Which of these applications would you most likely use if it were made available in Spanish?**

**Note to Moderator: Flip Chart - Write down and ask participants to rank the Top 3 applications**

- **Probe**
  - **What are the reasons you ranked these applications as the top 3 tools?**



4. Is there anything else you would like to see on our webpage that is business related that would help you help your LEP Small Business Taxpayers?

Probe

- Content?
- Tools
- Links to other sites?

5. We are going to complete a very quick exercise. Using the blank paper we distributed earlier, please take a moment to rate the web site using a letter grade -- "A" is Excellent and "F" is poor.

**(Give participants a minute.) Starting on my left and going round the table, tell me the grade you gave the web site and how you decided on the grade.**

**Probe: Depending on the grades, if all A's don't bother, but if there are Bs or Cs or lower...Ask, What can we do to make the web site an "A"?**

6. Do you have any other suggestions for improving the web site?

Thank you for sharing your ideas with me today. Your feedback will be used to make the web site more user-friendly and understandable. Thanks again!

## **2007 Survey on LEP Vital Documents at the Tax Practitioner Forums**

**Intended Audience for Survey Questionnaire: Attendees at 2007 Tax Forums**

*Note to Reviewers of Survey Questionnaire*

### **Purpose of Survey**

--To capture qualitative data on documents that Tax Forums Attendees deem vital for translation.

--Data will be considered along with other qualitative and quantitative data to determine whether the documents should be or continue to be designated as vital for translation.

### **Survey Development**

--Demographic questions 1-4 were developed based on analytical requirements such as size of non-English speaking clientele, language preference, location of survey participant, etc. (Space for demographic data collection is constrained due to the number of documents the survey wants the participant to consider) – Based on lessons learned from previous survey administration survey is being confined to one page.

--Categories were identified based on findings of prior surveys and focus groups with tax practitioners and other external stakeholders. Public use documents have been associated with each topic. Respondents are being asked to rank a specific number of documents under each category.

## TAX PRACTITIONER QUESTIONNAIRE

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1. Do you provide service to your customers in a language other than English?

YES       NO

If YES, what languages do you service? (please circle all that apply)

Chinese

Vietnamese

Korean

Russian

Spanish

Other \_\_\_\_\_

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2. Where is your office located?

City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_

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3. What percentage of your customers do not speak or read English very well and could benefit from products in their native language?

0 – 10%     11 – 25%     26 – 50%     51 – 75%     Over 76%

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4. What are the top 5 tax products (forms or publications) that you would like to see translated into Chinese?

i. \_\_\_\_\_

ii. \_\_\_\_\_

iii. \_\_\_\_\_

iv. \_\_\_\_\_

v. \_\_\_\_\_

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5. What are the top 5 tax products (forms or publications) that you would like to see translated into Vietnamese?

i. \_\_\_\_\_

ii. \_\_\_\_\_

iii. \_\_\_\_\_

iv. \_\_\_\_\_

v. \_\_\_\_\_

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6. What are the top 5 tax products (forms or publications) that you would like to see translated into Korean?

i. \_\_\_\_\_

ii. \_\_\_\_\_

iii. \_\_\_\_\_

iv. \_\_\_\_\_

v. \_\_\_\_\_

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7. What are the top 5 tax products (forms or publications) that you would like to see translated into Russian?

i. \_\_\_\_\_

ii. \_\_\_\_\_

iii. \_\_\_\_\_

iv. \_\_\_\_\_

v. \_\_\_\_\_

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8. What are the top 5 tax topics that are of specific interest to your clients?

i. \_\_\_\_\_

ii. \_\_\_\_\_

iii. \_\_\_\_\_

iv. \_\_\_\_\_

v. \_\_\_\_\_

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9. What percentage of your clients are wage earners and receive only W-2s?

0 – 10%    11 – 25%    26 – 50%    51 – 75%    Over 76%

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10. What percentage of your clients are self employed and have a small business?

0 – 10%    11 – 25%    26 – 50%    51 – 75%    Over 76%

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11. Would a Chinese, Vietnamese, Korean & Russian website be beneficial to your clients?

YES    NO

If YES, how?

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12. What products or services are needed, from the IRS, to help your limited-English small business customers understand and meet their tax obligations?

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Thank you