

Participant Recruitment - All

[Korean, Mandarin, Russian, Vietnamese] Language Needs Assessment Project

Please check just one response for each item.

1. Are you age 18 or older?

- Yes
- No **[Please see the Focus Group Moderator]**

2. How well do you speak English?

- Not well
- Not at all
- Well

3. What language do you speak?

- Spanish
- Chinese
- Korean
- Vietnamese
- Russian
- Other **[Please see the Focus Group Moderator]**

4. Did you file a tax return in 2007 or 2008?

- Yes
- No **[Please see the Focus Group Moderator]**

5. Do you own a business?

- Yes
- No **[Please see the Focus Group Moderator]**

Participant Screen (Business)

[Korean, Mandarin, Russian, Vietnamese] Language Needs Assessment Project

Hello, my name is **[first and last name]** may I speak to **[name from list]**? If someone other than respondent asks why you are calling, say: I'm calling regarding an important study of taxpayers who speak **[Korean/Mandarin/Vietnamese/Russian]** as a first language. We are paying participants to help us with this study.

(Check one answer)

- No one by that name at this number
- Speaking to respondent; respondent comes to the phone > Skip to Q3

Confirm you have dialed correctly. Ask if respondent was ever at this number (do they have his/her new number)?

If no new number is given, identify participant as not located.

Hello, my name is **[first and last name]**, and I'm calling from **[Marketing Company's Name]** for Kleimann Communication Group. Kleimann Communication Group is conducting a study to improve communication between IRS and those who speak **[Korean/Mandarin/Vietnamese/Russian]** as a first language. We will pay you \$100 to participate in this study, and your responses will be kept completely private.

This project is intended to find out what people think of IRS, paying taxes, and the services the IRS provides.

We will specify the precise time and date after we've asked you a few questions to see which group you qualify for. We will pay you \$100 at the end of the focus group for your participation. Do you have a few minutes to answer some pre-qualifying questions (if no, what would be a convenient time to call back?)? (If necessary, say: We are not selling anything, we are looking to recruit people to help out with a nationwide study. Everything you say will be kept private, and your identity will not be disclosed.

(Check One Answer)

1. Yes >continue with Q4.
2. No > call back time
3. Refuse > end of interview, thank respondent.

Please check just one response for each item.

Tell Us About You

1. Are you age 18 or older?
 - Yes
 - No **[Please see the Focus Group Moderator]**

2. Did you file a **business** tax return in 2007 or 2008? *(A business tax return means you filed one of the following forms: Schedules C, E, F, C-EZ, and 1120-S, which are used to report income or loss from a business you operated or a profession you practiced as a sole proprietor.)*
 - Yes
 - No **[Please see the Focus Group Moderator]**

3. How well do you speak English?
 - Not well
 - Not at all
 - Well

4. What language do you speak?
 - Spanish
 - Chinese
 - Korean
 - Vietnamese
 - Russian
 - Other **[Please see the Focus Group Moderator]**

5. Do you own a business?
 - Yes
 - No **[Please see the Focus Group Moderator]**

6. What is your gender?
 - Male
 - Female

7. Which of the following categories describes your current age?

- 17 years and under **[Please see the Focus Group Moderator]**
- 18 to 24
- 25 to 34
- 35 to 44
- 45 to 54
- 55 to 64
- 65 and older

8. Which of the following describes the highest level of education that you have attained?

- Less than 9th grade
- 9th to 12th grade, no diploma
- High school graduate (or GED)
- Some technical or vocational school
- Technical or vocational school graduate
- Some college, no degree
- Associate Degree
- Bachelor's Degree
- Master's Degree
- Post-Master's Degree

9. Which of the following categories describes your annual business revenue before taxes last year?

- Less than \$10,000
- 1. \$10,000 but less than \$15,000
- 2. \$15,000 but less than \$25,000
- 3. \$25,000 but less than \$35,000
- 4. \$35,000 but less than \$50,000
- 5. \$50,000 but less than \$75,000
- 6. \$75,000 but less than \$100,000
- 7. \$100,000 but less than \$150,000
- 8. \$150,000 but less than \$200,000
- 9. \$200,000 but less than \$1,000,000
- \$1,000,000 or more

10. What is your country of origin? **[Please specify]:** _____

Tell Us About Your Language Preferences

11. How well do you **read** [language]?

- Very well
- Not well
- Not at all

12. If you had to speak to an IRS representative, would you prefer to speak in English or another language?

- English
- Other **[Please specify]:** _____

Tell Us About Your Business

13. What kind of business do you own? What services are offered?

[Please specify]: _____

14. What is the location of your business (city, state)? _____

15. How many years have you owned your business? _____

16. How many employees do you have (including yourself)? [Please specify]:

Tell Us About Filing Taxes

17. Who completed your federal income tax return this year?

I filled out forms myself by hand

I used tax preparation software or an online application

A professional tax preparer, accountant or bookkeeper

Friend or family member

Volunteer (at a volunteer tax preparation location)

IRS Service representative at an IRS office

Other [Please specify]: _____

Don't know

18. Did you or your tax preparer file your tax return electronically?

Yes

No

Don't know

Thank you. You have finished the questionnaire.

The Paperwork Reduction Act requires that the IRS provide an OMB control number for 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 at: IRS Tax Products Coordinating Committee, SE:W:CAR:MP:T:T:SP, 1111 Constitution Ave., NW, IR-6406, Washington, DC 20224.

Focus Group Moderator's Guide Business Taxpayer

Asian Russian Language Needs Assessment—Phase I

Moderator's Note

Important: Remind sites to administer the consent form and participant questionnaire ahead of time.

Greet participants as they arrive and thank them for coming. Ask participants if they had any trouble finding the site and invite them to sit down. Make sure everyone has a name tent (first names only on both sides).

Note: a ★ denotes when the moderator should give something to participants.

Introduction of Moderator (5 minutes)

Welcome, and thank you for coming today. My name is _____. Just so you know, I am a contractor and do not work for the IRS, so you don't have to worry about what you say in this group.

We are required by law to report to you the OMB control number for this public information request. That number is 1545-1349.

As you can tell, I will be consulting my notes during this focus group. We will be talking with a number of people over the next few weeks, and we want to be sure we say the same thing in the same way to everyone.

Today, we are going to ask for your thoughts and opinions about the Internal Revenue Service—the IRS—and the services the IRS provides.

This research is part of a major effort at the IRS to improve the customer experience of **[insert language]**-speaking taxpayers. We're here because we and the Internal Revenue Service think we can learn a great deal from you. We want to learn what works and what doesn't work about the IRS service from taxpayers like you. So what you tell us is very important.

[If observers behind mirror] Behind the mirror are observers who have been involved in this project and are very interested in hearing your thoughts. We can meet them at the end of the session if you would like. Just let me know.

Privacy

I want to confirm that you have read and signed the consent form **[hold it up]** and participant questionnaire **[hold it up]**. I want to assure you that the information we collect here today will not identify you by name. For example, you do not put your name on the questionnaire that we've asked you to complete, so your answers cannot be identified as yours. In addition, we will not use your name, address, or any other identifying information in reports, papers, or other information based on this research. All data will be presented as a **collection** of ideas and thoughts shared.

We will be audio-taping this session to ensure that we collect complete information. The entire session will take about two hours. If you need to go to the restroom at any time during the session, please feel free to do so. The restrooms are located _____.

Instructions (5 minutes)

I have a number of topics to discuss with you. We are very interested in what you have to say during our time together today. However, sometimes, I may interrupt or close one part of the discussion to make sure that we cover everything on our agenda.

We're going to use several guidelines during this session:

- Please feel free to tell us whatever you're thinking throughout the session. There are no right or wrong answers. All of your comments are very important to us, but we realize that you may not have a comment on every topic.
- Second, please do not hold side conversations. We want to hear from everyone and side conversations make that difficult.
- Third, we want to make sure that everyone can hear what you say, so please speak up and speak one at a time.
- Fourth, please monitor your time. We want everyone to have a chance to speak.

Do you have any questions so far?

Participant Introductions (10 minutes)

Now, I'd like each of you to introduce yourself to the group by giving your first name and your country of origin. I'll start. My name is _____ and I was born in _____.

Introduction to Focus Group Session (2 minutes)

Today, we want to find out what all of you think about the IRS, taxes, and the services the IRS provides. I'll start with some general questions.

A. Awareness/Use (15 minutes)

1. Are you aware that the IRS provides products and services in your language?

Moderator's Note

For list of services available, see question 3.

If no one has used any of the services, skip to question 3.

Probe: Have you ever used any IRS services for help with anything tax related? If so, which service?

Probe: How did you hear or learn about that service?

Probe: What did you like or dislike about the service? Would you use it again?

Probe: Are there services you know about, but haven't used? Why not?

IRS does offer some services and tools for **[insert language]** taxpayers. Here's a list of the services available.

★ Moderator's Note

Hand out list of services available before Question 2.

2. Do you think that if you had the need, you would use these services? Which ones? Why or why not?

3. How should IRS get the word out about its many services?

B. Process of Paying/Filing (20 minutes)

4. Do you complete your own taxes or do you use a preparer? Why? Where else do you get help?
5. How do you file your tax return, electronic or paper?
6. **If paper, why?**

Moderator's Note

E-filing

- Most taxpayers can prepare and submit a return and receive a receipt electronically
- Taxpayers with ITINs cannot file electronically
- Taxpayers can only file Form 1040, 1040A, 1040EZ, or 1040SS(PR) electronically

7. What would you do if you had a problem after filing your taxes?

Probe: Would you reach out for help? To whom? Why this person or company? Why do you think this person or company can help?

Probe: *[If the person says he/she would go to the website, ask]:* What would you expect to find there?

8. What would you do if you had a question or needed help making a tax payment?

Probe: Would you reach out for help? To whom? Why this person or company? Why do you think this person or company can help?

Probe: *[If the person says he/she would go to the website, ask]:* What would you expect to find there?

★ Moderator's Note

Pass out rating scale for Question 9.

9. On a scale from 1 to 5, where 1 is "very easy" and 5 is "very hard," how easy or hard is preparing and filing taxes? Why?

Probe: What could the IRS do to lower that number and make it easier?

C. Basic Understanding/Knowledge (10 minutes)

10. Why do you pay taxes?

Moderator's Note

Paying taxes

1. Anyone receiving income, living in the U.S., over a certain age, and having an income must pay taxes.
2. Immigration status does not affect your obligation to pay taxes
3. "Taxable income" is money received from wages, self employment, tips, sale of property, etc.
4. You must have either a Social Security Number or an Individual Taxpayer Identification Number in order to file taxes.
5. Penalties for nonpayment can be either civil or criminal.

Probe: Is paying taxes a choice?

Probe: Why might someone NOT pay income taxes?

Moderator's Note

We want to know if they think any of the reasons might be why someone wouldn't pay taxes. Listen for the following:

- Didn't have to pay taxes in his/her country of origin
- Access issues (to transportation, etc.)
- Literacy issues (English)
- Lack of awareness of tax obligations
- Don't know where to turn to for assistance
- Fears about government (immigration or other)
- Financial problems
- Any other problems/barriers

11. Do you have any rights as a taxpayer in the U.S.? Do you know what they are?

Moderator's Note

Taxpayer rights. The IRS has identified eight (8) specific taxpayer rights. According to IRS Publication #1, Your Rights as a Taxpayer, they are

1. protection (IRS employees will explain and protect taxpayer's rights),
2. privacy (no disclosure),
3. professional and courteous service,
4. representation (self or {attorney, certified public accountant, or enrolled agent}),
5. payment of only the correct amount of tax,
6. help with unresolved tax problems,
7. appeals and judicial review, and
8. relief from certain penalties and interest.

D. Preferences for Format of Communications (20 minutes)

Let's talk the best format and best way for the IRS to get the word out about basic tax information.

12. What is your preferred method for getting basic tax information?

Moderator's Note

We want to know how they *ideally* would like to learn about services.
Probe to find out: Would they consult

- community leaders,
- friends,
- family,
- the internet,
- television,
- radio,
- a brochure they had to go pick up, or
- an insert that came with a notice.

13. **To get basic tax information, would you prefer to speak to a person at the IRS or have a written translated document in [insert language]? Why?**

★ **Moderator's Note**

Hand out ranking sheet for question 15.

14. I'm going to hand out a list and I'd like you to rank the list from 1 to 4 for how you would prefer to contact the IRS. In your ranking, 1 would be the most preferred method for contacting IRS and 4 would be the least preferred method for contacting IRS.

Probe: What did you pick as the most preferred method? Why is that more comfortable than the other methods?

Probe: What would make you more comfortable with the other methods?

Probe: What could IRS do to make you more comfortable contacting the IRS directly?

E. Product Feedback (25 minutes)

Now we would like to get your feedback about two informational pieces the IRS has developed.

Sometimes the IRS will send you a notice or letter about your tax return to ask for more information or to ask you to send another form in. The brochure I am about to hand out comes in the mail along with a notice.

★ **Moderator's Note**

Hand out *Understanding Your IRS Notice* brochure.

15. Please take a few minutes to skim the brochure I handed out. Just do what you would normally do if you received this in the mail along with a notice. **[Pause a few minutes until it looks like most participants have skimmed the brochure.]** Would you find this brochure helpful? Why? Why not?

Probe: Do you think it would be helpful for other [insert language]-speaking taxpayers?

16. Do you think you would read it if you received this brochure with a notice from the IRS? Why? Why not?

Probe: Under what circumstances would you read it? Where do you think you would find it?

Thanks for giving us feedback on that brochure. IRS has also recently developed a DVD with basic information taxpayers need to know. I'm going to show you a short clip of this DVD and then ask you some questions about it.

Moderator's Note

Collect brochures and then show 10 minute clip of DVD.

17. Do you find this DVD helpful? Why? Why not?

Probe: Do you think it would be helpful for other **[insert language]**-speaking taxpayers?

18. Under what circumstances would you watch it? Why or why not?

19. Do you have any additional thoughts on how the IRS could improve its services and communications with **[insert language]**-speaking taxpayers?

Closing Remarks (3 minutes)

Are there any questions that I can answer before we end our session? Let me check to see if the observers have any other questions. **[Observers bring moderator a list of additional questions, if needed.]** Thank you very much for participating in today's focus group. The information you provided has been very helpful. We appreciate your help! You can pick up your payment at **[wherever the testing facility designates].**

Thank you again for your participation.

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Artifacts for Questions 2, 9, and 14

Question 2

List of Available IRS Services:

- Kiosks
- Over-the-phone interpreter at Taxpayer Assistance Center
- Volunteer Income Tax Assistance Program
- Low Income Tax Clinics
- Taxpayer Advocate Service

Question 9

How easy or hard is preparing and filing your taxes? Circle on the scale below.



Question 14

Please rank the following from 1 to 4, where 1 is the most preferred method for contacting IRS and 4 is the least preferred method for contacting IRS.

_____ Go into a Taxpayer Assistance Center and pick up a phone to get an interpreter

_____ Pick up written translated information in your own language

_____ Go to the IRS.gov web site in your own language

_____ Other, please specify: _____

Participant Screen (Individual)

[Korean, Mandarin, Russian, Vietnamese] Language Needs Assessment Project

Hello, my name is **[first and last name]** may I speak to **[name from list]**? If someone other than respondent asks why you are calling, say: I'm calling regarding an important study of taxpayers who speak **[Korean/Mandarin/Vietnamese/Russian]** as a first language. We are paying participants to help us with this study.

(Check one answer)

- No one by that name at this number
- Speaking to respondent; respondent comes to the phone > Skip to Q3

Confirm you have dialed correctly. Ask if respondent was ever at this number (do they have his/her new number)?

If no new number is given, identify participant as not located.

Hello, my name is **[first and last name]**, and I'm calling from **[Marketing Company's Name]** for Kleimann Communication Group. Kleimann Communication Group is conducting a study to improve communication between IRS and those who speak **[Korean/Mandarin/Vietnamese/Russian]** as a first language. We will pay you \$100 to participate in this study, and your responses will be kept completely private.

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We will specify the precise time and date after we've asked you a few questions to see which group you qualify for. We will pay you \$100 at the end of the focus group for your participation. Do you have a few minutes to answer some pre-qualifying questions (if no, what would be a convenient time to call back?)? (If necessary, say: We are not selling anything, we are looking to recruit people to help out with a nationwide study. Everything you say will be kept private, and your identity will not be disclosed.

(Check One Answer)

1. Yes >continue with Q4.
2. No > call back time
3. Refuse > end of interview, thank respondent.

Please check just one response for each item.

Tell Us About You

1. Are you age 18 or older?
 - Yes
 - No **[Please see the Focus Group Moderator]**

2. Did you file a tax return in 2007 or 2008? *(A business tax return means you filed one of the following forms: Schedules C, E, F, C-EZ, and 1120-S, which are used to report income or loss from a business you operated or a profession you practiced as a sole proprietor.)*
 - Yes
 - No **[Please see the Focus Group Moderator]**

3. How well do you speak English?
 - Not well
 - Not at all
 - Well

4. What language do you speak?
 - Spanish
 - Chinese
 - Korean
 - Vietnamese
 - Russian
 - Other **[Please see the Focus Group Moderator]**

5. Do you own a business?
 - Yes
 - No **[Please see the Focus Group Moderator]**

6. What is your gender?
 - Male
 - Female

7. Which of the following categories describes your current age?
 - 17 years and under **[Please see the Focus Group Moderator]**
 - 18 to 24
 - 25 to 34

- 35 to 44
- 45 to 54
- 55 to 64
- 65 and older

8. Which of the following describes the highest level of education that you have attained?

- Less than 9th grade
- 9th to 12th grade, no diploma
- High school graduate (or GED)
- Some technical or vocational school
- Technical or vocational school graduate
- Some college, no degree
- Associate Degree
- Bachelor's Degree
- Master's Degree
- Post-Master's Degree

9. Which of the following categories describes your annual household income before taxes last year?

- Less than \$10,000
- \$10,000 but less than \$15,000
- \$15,000 but less than \$25,000
- \$25,000 but less than \$35,000
- \$35,000 but less than \$50,000
- \$50,000 but less than \$75,000
- \$75,000 but less than \$100,000
- \$100,000 but less than \$150,000
- \$150,000 but less than \$200,000
- \$200,000 but less than \$1,000,000
- \$1,000,000 or more

10. What is your country of origin? **[Please specify]:** _____

Tell Us About Your Language Preferences

11. How well do you **read** [language]?

- Very well
- Not well
- Not at all

12. If you had to speak to an IRS representative, would you prefer to speak in English or another language?

- English
- Other **[Please specify]:** _____

Tell Us About Your Occupation

13. What is your occupation? **[Please specify]:** _____

14. What is your work status?

- Self-employed/employed
- Homemaker
- Retired
- Unemployed
- Other: **[Please specify]:** _____

Tell Us About Filing Taxes

15. Did you file a tax return in 2006 or 2007?

- Yes
- No **[Please See Focus Group Moderator]**

16. Are you the primary person responsible for filing taxes in your family?

- Yes
- No **[Please See Focus Group Moderator]**

17. Which number do you use to file your taxes?

- Social Security Number (SSN)
- Individual Taxpayer Identification Number (ITIN)
- Other **[Please specify type of number]:** _____

18. Who completed your federal income tax return this year?

- I filled out forms myself by hand
- I used tax preparation software or an online application
- A professional tax preparer, accountant or bookkeeper
- Friend or family member
- Volunteer (at a volunteer tax preparation location)
- IRS Service representative at an IRS office
- Other **[Please specify]:** _____
- Don't know

19. Did you or your tax preparer file your tax return electronically?

- Yes
- No
- Don't know

Tell Us About Your Stimulus Rebate Experience

20. How did you hear about the economic stimulus payment (tax rebate)?

- Yes
- Letter or postcard from the IRS
- IRS website
- Non-IRS website **[Please skip to question 26]**
- Accountant/tax professional **[Please skip to question 26]**
- Tax software **[Please skip to question 26]**
- Friend of family member **[Please skip to question 26]**
- Newspaper, TV, or radio **[Please skip to question 26]**
- Non-IRS website **[Please skip to question 26]**
- I did not hear about the economic stimulus package **[Please skip to question 26]**
- Other **[Please specify]:** _____ **[Please skip to question 26]**

21. How satisfied were you with the clarity of information about **what to do** to receive the stimulus payment?

- Very dissatisfied
- Dissatisfied
- Neutral
- Satisfied
- Very satisfied
- Don't know

22. How satisfied were you with the clarity of information about **the amount** of the stimulus you would receive?

- Very dissatisfied
- Dissatisfied
- Neutral
- Satisfied
- Very satisfied
- Don't know

23. Did you receive a stimulus payment?

- No, I did not receive a stimulus payment.
- Yes, I received the amount I expected.
- Yes, but I did not receive the amount I expected.

- Don't know

Thank you. You have finished the questionnaire.

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Focus Group Moderator's Guide

Individual Taxpayer

Asian Russian Language Needs Assessment—Phase I

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Participant Introductions (10 minutes)

Now, I'd like each of you to introduce yourself to the group by giving your first name and your country of origin. I'll start. My name is _____ and I was born in _____.

Introduction to Focus Group Session (2 minutes)

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A. Awareness/Use (15 minutes)

1. Are you aware that the IRS provides products and services in your language?

Moderator's Note

For list of services available, see question 3.

If no one has used any of the services, skip to question 3.

Probe: Have you ever used any IRS services for help with anything tax related? If so, which service?

Probe: How did you hear or learn about that service?

Probe: What did you like or dislike about the service? Would you use it again?

Probe: Are there services you know about, but haven't used? Why not?

IRS does offer some services and tools for **[insert language]** taxpayers. Here's a list of the services available.

★ Moderator's Note

Hand out list of services available before Question 2.

2. Do you think that if you had the need, you would use these services? Which ones? Why or why not?

3. How should IRS get the word out about its many services?

B. Process of Paying/Filing (20 minutes)

4. Do you complete your own taxes or do you use a preparer? Why? Where else do you get help?
5. How do you file your tax return, electronic or paper?
6. **If paper, why?**

Moderator's Note

E-filing

- Most taxpayers can prepare and submit a return and receive a receipt electronically
- Taxpayers with ITINs cannot file electronically
- Taxpayers can only file Form 1040, 1040A, 1040EZ, or 1040SS(PR) electronically

7. What would you do if you had a problem after filing your taxes?

Probe: Would you reach out for help? To whom? Why this person or company? Why do you think this person or company can help?

Probe: *[If the person says he/she would go to the website, ask]:* What would you expect to find there?
8. What would you do if you had a question or needed help making a tax payment?

Probe: Would you reach out for help? To whom? Why this person or company? Why do you think this person or company can help?

Probe: *[If the person says he/she would go to the website, ask]:* What would you expect to find there?

★ Moderator's Note

Pass out rating scale for Question 9.

9. On a scale from 1 to 5, where 1 is "very easy" and 5 is "very hard," how easy or hard is preparing and filing taxes? Why?

Probe: What could the IRS do to lower that number and make it easier?

C. Basic Understanding/Knowledge (10 minutes)

10. Why do you pay taxes?

Moderator's Note

Paying taxes

6. Anyone receiving income, living in the U.S., over a certain age, and having an income must pay taxes.
7. Immigration status does not affect your obligation to pay taxes
8. "Taxable income" is money received from wages, self employment, tips, sale of property, etc.
9. You must have either a Social Security Number or an Individual Taxpayer Identification Number in order to file taxes.
10. Penalties for nonpayment can be either civil or criminal.

Probe: Is paying taxes a choice?

Probe: Why might someone NOT pay income taxes?

Moderator's Note

We want to know if they think any of the reasons might be why someone wouldn't pay taxes. Listen for the following:

- Didn't have to pay taxes in his/her country of origin
- Access issues (to transportation, etc.)
- Literacy issues (English)
- Lack of awareness of tax obligations
- Don't know where to turn to for assistance
- Fears about government (immigration or other)
- Financial problems
- Any other problems/barriers

11. Do you have any rights as a taxpayer in the U.S.? Do you know what they are?

Moderator's Note

Taxpayer rights. The IRS has identified eight (8) specific taxpayer rights. According to IRS Publication #1, Your Rights as a Taxpayer, they are

9. protection (IRS employees will explain and protect taxpayer's rights),
10. privacy (no disclosure),
11. professional and courteous service,
12. representation (self or {attorney, certified public accountant, or enrolled agent}),
13. payment of only the correct amount of tax,
14. help with unresolved tax problems,
15. appeals and judicial review, and
16. relief from certain penalties and interest.

D. Preferences for Format of Communications (20 minutes)

Let's talk about the best format and best way for the IRS to get the word out about basic tax information.

12. What is your preferred method for getting basic tax information?

Moderator's Note

We want to know how they *ideally* would like to learn about services.
Probe to find out: Would they consult

- community leaders,
- friends,
- family,
- the internet,
- television,
- radio,
- a brochure they had to go pick up, or
- an insert that came with a notice.

13. **To get basic tax information, would you prefer to speak to a person at the IRS or have a written translated document in [insert language]? Why?**

★ **Moderator's Note**

Hand out ranking sheet for question 15.

14. I'm going to hand out a list and I'd like you to rank the list from 1 to 4 for how you would prefer to contact the IRS. In your ranking, 1 would be the most preferred method for contacting IRS and 4 would be the least preferred method for contacting IRS.

Probe: What did you pick as the most preferred method? Why is that more comfortable than the other methods?

Probe: What would make you more comfortable with the other methods?

Probe: What could IRS do to make you more comfortable contacting the IRS directly?

E. Product Feedback (25 minutes)

Now we would like to get your feedback about two informational pieces the IRS has developed.

Sometimes the IRS will send you a notice or letter about your tax return to ask for more information or to ask you to send another form in. The brochure I am about to hand out comes in the mail along with a notice.

★ **Moderator's Note**

Hand out *Understanding Your IRS Notice* brochure.

15. Please take a few minutes to skim the brochure I handed out. Just do what you would normally do if you received this in the mail along with a notice. **[Pause a few minutes until it looks like most participants have skimmed the brochure.]** Would you find this brochure helpful? Why? Why not?

Probe: Do you think it would be helpful for other [insert language]-speaking taxpayers?

16. Do you think you would read it if you received this brochure with a notice from the IRS? Why? Why not?

Probe: Under what circumstances would you read it? Where do you think you would find it?

Thanks for giving us feedback on that brochure. IRS has also recently developed a DVD with basic information taxpayers need to know. I'm going to show you a short clip of this DVD and then ask you some questions about it.

Moderator's Note

Collect brochures and then show 10 minute clip of DVD.

17. Do you find this DVD helpful? Why? Why not?

Probe: Do you think it would be helpful for other **[insert language]**-speaking taxpayers?

18. Under what circumstances would you watch it? Why or why not?

19. Do you have any additional thoughts on how the IRS could improve its services and communications with **[insert language]**-speaking taxpayers?

Closing Remarks (3 minutes)

Are there any questions that I can answer before we end our session? Let me check to see if the observers have any other questions. **[Observers bring moderator a list of additional questions, if needed.]** Thank you very much for participating in today's focus group. The information you provided has been very helpful. We appreciate your help! You can pick up your payment at **[wherever the testing facility designates].**

Thank you again for your participation.

The Paperwork Reduction Act requires that the IRS provide an OMB control number for 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 at: IRS Tax Products Coordinating Committee, SE:W:CAR:MP:T:T:SP, 1111 Constitution Ave., NW, IR-6406, Washington, DC 20224.

Artifacts for Questions 2, 9, and 14

Question 2

List of Available IRS Services:

- Kiosks
- Over-the-phone interpreter at Taxpayer Assistance Center
- Volunteer Income Tax Assistance Program
- Low Income Tax Clinics
- Taxpayer Advocate Service

Question 9

How easy or hard is preparing and filing your taxes? Circle on the scale below.



Question 14

Please rank the following from 1 to 4, where 1 is the most preferred method for contacting IRS and 4 is the least preferred method for contacting IRS.

_____ Go into a Taxpayer Assistance Center and pick up a phone to get an interpreter

_____ Pick up written translated information in your own language

_____ Go to the IRS.gov web site in your own language

_____ Other, please specify: _____

Privacy Statement & Consent Form

[Korean/Mandarin/Vietnamese/Russian] Language Needs Assessment Project

The Kleimann Communication Group is a contractor working for the Internal Revenue Service (IRS). Our project will collect information in an effort to better understand the specific needs of **[Korean/Mandarin/Vietnamese/Russian]**-speaking taxpayers.

We want you to understand the following as you talk with us today:

- Your participation is completely voluntary.
- Your name will not be used in any written reports or presentations for this project.
- Your answers and comments will not be associated with you in any way.
- We are audio-taping our session with you. This recording is only so that we can review your comments and accurately describe them.
- Staff from the research teams will observe the interview from another room.
- The focus group will take no more than 120 minutes to complete.
- You will receive \$100 at the completion of the focus group.

Please print your name, then sign and date this form below.

We thank you for your participation in this important project.

Your Name _____

Your Signature _____

Today's Date _____

The Paperwork Reduction Act requires that the IRS provide an OMB control number for 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 at: IRS Tax Products Coordinating Committee, SE:W:CAR:MP:T:T:SP, 1111 Constitution Ave., NW, IR-6406, Washington, DC 20224.