

**IRS W&I ACS Support
Phone Focus Group Recruiting Guide**

**PMR: Please recruit 1 group (9 for 6 to show up)
Groups need be completed by July 1, 2012 (POP ends July 18, 2012)**

Hello, I'm _____ and I'm calling from _____. You recently took a phone survey about your interaction with **IRS' Automated Collection System Support** and indicated that you are interested in follow-up research. We are setting up a one-hour phone focus group interview with taxpayers to improve that survey. This is NOT a call about your specific case. This is your opportunity to provide input about your experiences and to make recommendations for change.

First, can you confirm that you completed a survey with the IRS' Automated Collection System Support **within the past 6 months?**

1. Yes (Continue)
2. No (Thank taxpayer for their time, and hang up)

Your participation with this research is voluntary, but your help on this project would be very much appreciated. As a token of our appreciation for your time, you will receive \$50. Are you interested in participating? *[If no, thank taxpayer for their time, and hang up]*

The focus group will be held via telephone on <DATE> at <TIME>. All participants will call in to an 800 number to join the conference call. The discussion will last about one hour. You will be joined by a group of about six people who, like you, have experience with the **IRS' Automated Collection System Support** process. You will not be asked about your specific tax situation, only about your experience with this process. Would you be able to participate? *[If no, thank them and terminate the call].*

1. Are you or is anyone in your immediate family an employee of the IRS?

_____ Yes *[explain, thank, then terminate the call]*
_____ No

2. Please let us know which time works best for you on DATE.
[Recruiter: recruit 9 for each group, mix males and females]

<TIME>

3. *[Recruiter: note male or female]*

_____ Male
_____ Female

We are delighted that you will participate in our group.

The dial in number is: XXXXXXXX

The access code is: XXXX

Do you have any questions? We would like some contact information to confirm the meeting and to mail out the token of appreciation for your participation.

Respondent Name _____

Respondent Address _____

We would also like to give you a reminder call on the day of the group. Would we reach you at this number or another? [record number _____]

The Paperwork Reduction Act requires that IRS provide an OMB Control Number on all approved public information requests. That number is OMB 1545-1432. Also, if you like, I can give you an address where you can send comments and questions regarding this process or suggestions for making it simpler.

READ ONLY IF RESPONDENT ASKS FOR ADDRESS: Send your comments and suggestions to:

IRS Tax Products Coordinating Committee
1111 Constitution Avenue, NW
Washington , DC 20224

Thank you and have a nice day. We look forward to speaking with you on:

<DATE TIME>

Reminder Calls

Hello, I'm _____ calling from _____. This is a reminder that you have agreed to participate in a one-hour phone focus group interview of taxpayers to better understand how to improve service to taxpayers like you.

Your scheduled date and time to dial in is <DATE TIME>

The dial in number is: XXXXXXXX

The access code is: XXXX

Do you have any questions? Thank you and have a nice day.

For record keeping:

_____ Reminder call made

IRS – W&I ACS Support Customer Satisfaction Study
FOCUS GROUP MODERATOR’S GUIDE
March 20, 2012

Overview

Hello, I’m Elaine Chan from Pacific Consulting Group. I will moderate our discussion today. Our discussion will focus on resolving collection issues. All of you completed a phone survey concerning your experiences with the IRS’s service. We are working on updating that questionnaire to ensure that the questions reflect all the key elements to be considered in your experience.

First, I would like to thank all of you for calling in today. Our discussion will take about one hour. I would like to know your real attitudes and feelings, so please be as open and frank with me as you can. I would like for you to think about your opinions of the IRS with regard to resolving collection issues.

I am recording this session, and some IRS research personnel, NOT those who work on cases, are listening in, but please keep in mind that my focus here is on your experiences and opinions, not on your individual identities.

I also want to point out that I am not an IRS employee and there are no right or wrong answers so please don’t hold back any of your perceptions, opinions, and suggestions.

Please have a copy of the questionnaire in front of you for this discussion. You should have received this by mail from the recruiters.

Introductions

To get started, let’s introduce ourselves. Please tell us your first name and the city you’re located in. Let’s start with...*[Moderator: Gather responses in a roundtable fashion]*

Discussion

First, I’d like to understand what motivated you to respond to this survey. I’d like everyone to answer this question. Let’s begin with ...*[Moderator: Gather responses in a roundtable fashion]*

Moderator “What does the phrase “received letters from the IRS about a balance due or an unfiled tax return” mean to you?”

Question Number	Question Text
<i>Moderator</i>	<i>“Next, I’m going to review the questionnaire and focus on understanding whether or not the questions are clear. I will begin by reading the instructions”</i>
	First, I am going to ask you a few questions about your experience working with the IRS through the mail to resolve taxes owed or an

	unfiled return. Please rate your satisfaction with the following where 5 equals very satisfied, 4 equals satisfied, three equals neither satisfied or dissatisfied, 2 equals dissatisfied and 1 equals very dissatisfied.
Moderator	<i>“Please describe anything that is unclear about these instructions.” “What about the satisfaction scale”</i>
Moderator	<i>[Moderator: For each rating item below 1 - 10, ask] “Please describe anything that is unclear about this rating item.”</i>
1	Regardless of the outcome of your case, please rate your overall satisfaction with the service you received while corresponding with the IRS about your possible unpaid tax or late return.
2	Rate your satisfaction with how well the IRS explained why they did (or did not) accept the documents/explanation you provided
3	Rate your satisfaction with the consistency of information provided to you by the IRS throughout the process
4	Rate your satisfaction with how well the IRS letter explained the resolution of your case
5	Rate your satisfaction with how well the IRS letter explained your payment options
6	Rate your satisfaction with the length of the process to complete the collection process from when you first mailed information until your issue was resolved
7	Rate your satisfaction with the time you were given to respond to the IRS
8	If you answered " Very Dissatisfied" or "Somewhat dissatisfied" to any of the above questions, can you describe what caused you to feel that way?
Moderator	<i>“OK, Now I would like you to listen to and think about some questions we have about the time it takes to work with the IRS’s Automated Collection System Support through the U.S. Mail. I will begin with the instructions:”</i>
	<i>For the next few questions, please answer by providing the number or answer that best matches your experience</i>
Moderator	<i>Here are the questions:</i>
9	When you were first notified that you might owe taxes or have an unfiled return, how many months did you expect it would take to resolve?
10	What was the actual amount of time in months?
Moderator	<i>“Is anything unclear about the instructions? The questions? Can you think of anything that might help more clearly gather information on the time it takes to work with ACS support?”</i>
Moderator	<i>“Next I would like to talk about your impressions of the process of working with ACS Support. With the next few questions we are trying to measure how you felt about the interaction with the IRS personnel in ACS Support.”</i>
	<i>Using a five point scale where 5 is strongly agree, 4 is agree, 3 is neutral, 2 is disagree 1 is strongly disagree, How much do you agree with the following statements?</i>

11	I received an adequate description of the collection process
12	My experience reflected the described process
13	I had the opportunity to provide information important to my case
14	I was treated with respect during the process
	<i>“Is anything unclear about the instructions? The questions? Can you think of anything that might help more clearly gather information on the experience of working with ACS support?”</i>
Moderator	<i>“OK, we’re just about finished with our review of the survey questions. For the next few questions, I want you to listen and tell me anything that is unclear or confusing”</i>
	<i>The next question is about how well the IRS met your expectations while sending and receiving letters about your possible unpaid taxes or late tax return.</i>
15	Using a five point scale where 5 is Much better than expected, 4 is better than expected, 3 is as expected 2 is worse than expected and 1 is much worse than expected; Overall, how well did the IRS meet your expectations while handling this collection?
16	If you answered "Worse than expected" or "Much worse than expected" to the above question, can you please describe what caused you to feel that way?
17	Do you have any suggestions or comments you would like to make to the IRS regarding how they could improve service during this latest contact?

[Moderator] “OK, thanks for your help refining the survey. I have one final question. How could you tell when you began working with the Automated Collection System Support area of the IRS?”

Wrap Up/Thanks

Those are all the questions that I have for this session today. Your feedback has been very helpful. I want to thank you and the IRS wants to thank you for participating in this discussion. You should each receive the honorarium check for \$50 within the next 10 days. If you do not receive your check in 10 days, please call me at 650-327-8108. Thanks and have a nice day.