

**IRS W&I Field Assistance  
Facilitated Self Assistance (FSA/non-FSA) Phone Focus Group Recruiting Guide and  
Reminder  
April 2012**

**[Recruiters: recruit 6 FSA users for DATE @ Noon Eastern, and recruit 6 non-FSA users for DATE @ 3PM Eastern]**

**INITIAL CALL**

Hello, I'm \_\_\_\_\_ and I'm calling from \_\_\_\_\_. You recently visited a local IRS office and indicated you would be interested in participating in a research study. We are calling to set-up this one-hour focus group call for the study. This is NOT a call about your specific case. Participation in the focus group will give you an opportunity to tell the IRS about your service experiences and the group can share their ideas for service improvements.

Your participation in 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 **DAY, DATE** at (Noon Eastern for FSA user, 3pm for non-FSA user). All participants will call a toll-free 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, recently visited a local IRS office. 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. Did you use a computer terminal at a local IRS office rather than being assisted face-to-face by an IRS representative?

\_\_\_\_\_ Yes *[Continue as FSA user]*  
 \_\_\_\_\_ No *[Continue as non-FSA user]*

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

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

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

\_\_\_\_\_ Male  
 \_\_\_\_\_ Female

4. *[Recruiter: note office area]*

\_\_\_\_\_ Area 1  
 \_\_\_\_\_ Area 2  
 \_\_\_\_\_ Area 3  
 \_\_\_\_\_ Area 4

\_\_\_\_\_ Area 5

We are delighted that you will participate in our group.

The dial in number is: XXXXXX

The access code is: XXXXX (Noon EST)

XXXXX (3pm EST)

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 1545-1349. 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:

Internal Revenue Service,  
Tax Products Coordinating Committee,  
Room #IR-6406  
1111 Constitution Ave. NW  
Washington, DC 20224

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

DAY DATE at Noon EST

DAY DATE at 3pm EST

DAY DATE at 6pm EST

For record keeping:

\_\_\_\_\_ Confirmation letter mailed or faxed

\_\_\_\_\_ Reminder call made

**REMINDER CALL**

Hello, I'm \_\_\_\_\_ and I'm calling from \_\_\_\_\_. This is a call to remind you of your participation in the telephone focus group scheduled for (DATE AND TIME). The dial in number is: XXX-XXX-XXXX. The access code is: XXXX#. Do you have any questions? (PAUSE AND ANSWER QUESTIONS). Thank you in advance for your participation.

**IRS W&I Field Assistance  
Virtual Service Delivery (VSD) Phone Focus Group Recruiting Guide and Reminder  
April 2012**

**[Recruiters: recruit 6 VSD users for DATE @ 6PM Eastern]**

**INITIAL CALL**

Hello, I'm \_\_\_\_\_ and I'm calling from \_\_\_\_\_. You recently visited a local IRS office and indicated you would be interested in participating in a research study. We are calling to set-up this one-hour focus group call for the study. This is NOT a call about your specific case. Participation in the focus group will give you an opportunity to tell the IRS about your service experiences and the group can share their ideas for service improvements.

Your participation in 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 **DAY, DATE** at 6pm Eastern Time. All participants will call a toll-free 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, recently visited a local IRS office. 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. Our records indicate that you received assistance from another IRS office virtually through a computer monitor located at this IRS office. Is this correct?

\_\_\_\_\_ Yes *[Continue]*

\_\_\_\_\_ No – We are looking to speak with taxpayers who received assistance through the virtual service. We will keep your name and consider contacting you for other research *[Thank and end call]*

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

\_\_\_\_\_ Yes *[explain, thank, then terminate the call]*

\_\_\_\_\_ No

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

\_\_\_\_\_ Male

\_\_\_\_\_ Female

4. *[Recruiter: note office area]*

\_\_\_\_\_ Area 1

\_\_\_\_\_ Area 2

\_\_\_\_\_ Area 3

\_\_\_\_\_ Area 4

\_\_\_\_\_ Area 5

We are delighted that you will participate in our group.

The dial in number is: XXXXXX

The access code is: XXXXX

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 1545-1349. 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:

Internal Revenue Service,  
Tax Products Coordinating Committee,  
Room #IR-6406  
1111 Constitution Ave. NW  
Washington, DC 20224

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

DAY DATE at Noon EST

DAY DATE at 3pm EST

DAY DATE at 6pm EST

For record keeping:

\_\_\_\_\_ Confirmation letter mailed or faxed

\_\_\_\_\_ Reminder call made

**REMINDER CALL**

Hello, I'm \_\_\_\_\_ and I'm calling from \_\_\_\_\_. This is a call to remind you of your participation in the telephone focus group scheduled for (DATE AND TIME). The dial in number is: XXX-XXX-XXXX. The access code is: XXXX#. Do you have any questions? (PAUSE AND ANSWER QUESTIONS). Thank you in advance for your participation.

**W&I Field Assist 2012 - Phone Focus Groups Confirmation Letter**

[DATE]

Thank you for your willingness to participate in a one-hour phone focus group interview of taxpayers to better understand the service you received and your service needs. This is NOT a call about your specific case. This is your opportunity to have input and to tell the IRS what your experiences have been and to make recommendations for change.

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.

The focus group will be held by telephone on DAY DATE at (STATE TIME FOR EACH TAXPAYER: TIMES Eastern Time). All participants will call in to a toll-free number to join the conference call. The discussion will last about one hour. You will be joined by a group of up to 6 people who, like you, have experience with the IRS's process. You will not be asked about your specific tax situation, only about your experience with this process.

We are delighted that you will participate in our group.

The dial in number is: XXX-XXX-XXXX  
The access code is: XXXX#

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, you may write to the IRS.

Send your comments and suggestions to:

**Internal Revenue Service,  
Tax Products Coordinating Committee,  
Room #IR-6406  
1111 Constitution Ave. NW  
Washington, DC 20224**

Thank you and have a nice day. We look forward to speaking with you on: (STATE APPROPRIATE DATE AND TIME FOR TAXPAYER)

**IRS W&I Field Assistance**  
**Phone Focus Group Moderator's Guide – Facilitated Self Assistance**  
**Wednesday May 9 2012 at Noon Eastern**  
*(Notes to the moderator are in italics)*

**Overview**

Hello, I'm Elaine Chan from Pacific Consulting Group. I will moderate our discussion today. The topic we'll be discussing is your experience with the IRS office you visited recently and your feelings about the service you received. The overall goal of the research is to provide information that will help the IRS provide better service to customers like you. Specifically, we are working with the IRS to make changes to their local offices. Your input is very important for establishing the areas of the process that need improvement. This is your opportunity to have input and to tell the IRS what your experiences have been and to make recommendations for change.

First, I would like to thank all of you for calling in today. Our discussion will take about one hour. We would like to know your real attitudes and feelings, so please be as open and frank with us as you can. We would like for you to think about your opinions of the IRS with regard to your interactions with them and not your opinions regarding tax laws specifically. We are recording this session, and we have some IRS personnel listening in with us, but please keep in mind that our focus here is on your experiences and opinions, not on your individual identities.

I understand that you used a computer at the local IRS office rather than being assisted face-to-face by an IRS representative. Is that correct? *[Thank and end call with anyone who does not meet this criterion]*

**Introductions**

*[Moderator: Gather responses in a roundtable fashion]*

To get started, let's introduce ourselves. Please tell us your first name, the IRS office that you visited and your main reason for visiting the office.

**Willingness to Use**

*[Moderator: Roundtable]*

- How did you learn about being able to use a computer at the IRS?
  - Did you see any posters or pamphlets while you were in the office explaining this service?
- Why did you choose to use a computer at the local IRS office instead of being assisted by an IRS representative?
- Did an IRS employee give you the option of using a computer to answer your question or complete your transaction?
- Did an IRS employee explain how to use the computer?

**Ease of Use**

*[Moderator: Roundtable]*

- Was there an IRS employee available to assist you with the computer?
- How easy or difficult was it to find the information or conduct the transaction you needed?

- How long did it take you to complete your transaction?

### **Issue Resolution**

*[Moderator: Roundtable]*

- Did your task require printing?
- Were you able to get an answer to your question or complete your transaction?
  - If you were unable to get the service you needed what was the main reason?

### **Satisfaction**

*[Moderator: Roundtable]*

- Please rate your overall satisfaction with the service you received from using the computer at the local IRS office? Were you very satisfied, somewhat satisfied, neither satisfied nor dissatisfied, somewhat dissatisfied, or very dissatisfied?
- Do you plan on seeking additional help from the IRS? If yes, by what method?
- Would you use the IRS website (IRS.gov) again in the future?

### **IRS Services**

*[Moderator: Group discussion]*

- Before today, how many of the following IRS resource or services listed below had you ever used (even once) Choices are:
  - a) IRS forms and instruction booklets
  - b) IRS website (www.IRS.gov)
  - c) IRS Office (Taxpayer Assistance Center)
  - d) IRS phone representative
  - e) Automated IRS phone system
  - f) E-mail with the IRS
  - g) Written correspondence with the IRS (other than E-mail)
  - h) Virtual Assistance
  - i) IRS Twitter
  - j) IRS YouTube
  - k) None

### **Computer Comfort Level**

*[Moderator: Roundtable]*

- What is your comfort level with using computers?
- Do you have access to the internet?
- Where do you have access to the internet? (work, home, school, library, cell phone or other)
- Have you ever used a kiosk at a grocery store, bank or airport?

### **Overall Improvement**

- The last question I have concerns suggestions for improvement. Do you have any comments or suggestions regarding the IRS computers, including how your experience compared to in-person assistance?

### **Wrap Up**

Those are all the questions that I have for this session. I want to thank you and the IRS wants to thank you, for participating in this discussion. PCG will be sending a \$50 token of our appreciation in the mail within two weeks.

**IRS W&I Field Assistance**  
**Phone Focus Group Moderator's Guide – Non-Facilitated Self Assistance Users**  
**Wednesday May 9 2012 at 3PM Eastern**  
*(Notes to the moderator are in italics)*

**Overview**

Hello, I'm Elaine Chan from Pacific Consulting Group. I will moderate our discussion today. The topic we'll be discussing is your experience with the IRS office you visited recently and your feelings about the service you received. The overall goal of the research is to provide information that will help the IRS provide better service to customers like you. Specifically, we are working with the IRS to make changes to their local offices. Your input is very important for establishing the areas of the process that need improvement. This is your opportunity to have input and to tell the IRS what your experiences have been and to make recommendations for change.

First, I would like to thank all of you for calling in today. Our discussion will take about one hour. We would like to know your real attitudes and feelings, so please be as open and frank with us as you can. We would like for you to think about your opinions of the IRS with regard to your interactions with them and not your opinions regarding tax laws specifically. We are recording this session, and we have some IRS personnel listening in with us, but please keep in mind that our focus here is on your experiences and opinions, not on your individual identities.

I understand that you did not use a computer at the local IRS office but rather you were assisted face-to-face by an IRS representative. Is that correct? *[Thank and end call with anyone who does not meet this criterion]*

**Introductions**

*[Moderator: Gather responses in a roundtable fashion]*

To get started, let's introduce ourselves. Please tell us your first name, the IRS office that you visited and your main reason for visiting the office.

**Willingness to Use**

*[Moderator: Roundtable]*

- Did an IRS employee give you the option of using a computer to answer your question or complete your transaction?
  - If yes, what was the MAIN reason you did not choose to use the IRS computers?
- Were you aware that this service existed in the IRS office?
  - *[If not, probe:]* Would you have used the service if you knew it was available?
  - *[For those unaware of FSA]* What could the IRS do to make it more obvious that this service exists?
- Did you see any posters or pamphlets while you were in the office explaining this service?
- Did you notice if there was an IRS person present to help visitors on the computers?

**Issue Resolution**

*[Moderator: Roundtable]*

- Were you able to get an answer to your question or complete your transaction?



- o If you were unable to get the service you needed what was the main reason?

### **IRS Services**

*[Moderator: Group discussion]*

- What options are you aware of besides face-to-face assistance from IRS? *[Probe to check awareness of IRS.gov, phone assistance and other channels]*
- Before today, how many of the following IRS resource or services listed below had you ever used. Choices are:
  - o IRS forms and instruction booklets
  - o IRS website (www.IRS.gov)
  - o IRS Office (Taxpayer Assistance Center)
  - o IRS phone representative
  - o Automated IRS phone system
  - o Volunteer Income Tax Assistance (VITA)
  - o E-mail with the IRS
  - o Written correspondence with the IRS (other than E-mail)
  - o Virtual Assistance
  - o IRS Twitter
  - o IRS YouTube
  - o None

### **Computer Comfort Level**

*[Moderator: Roundtable]*

- What is your comfort level with using computers in general?
- Do you have access to the internet?
- Where do you have access to the internet? (work, home, school, library, cell phone or other)
- Have you ever used a kiosk at a grocery store, bank or airport?

### **Future IRS Visit**

- In the future would you consider using the IRS website (IRS.gov) to get an answer or resolve your issue?
- In the future would you consider using a computer at the local IRS office with help of an assistor to complete your business instead of talking to a representative in-person?
  - o *[If not, probe:]* What could IRS do to get you to want to use a computer?

### **Overall Improvement**

- The last question I have is concerning suggestions for improvement. What additional suggestions do you have for the IRS regarding how they can serve you better?

### **Wrap Up**

Those are all the questions that I have for this session. I want to thank you and the IRS wants to thank you, for participating in this discussion. PCG will be sending a \$50 token of our appreciation in the mail within two weeks.

**IRS W&I Field Assistance**  
**Phone Focus Group Moderator's Guide – Virtual Service Delivery (VSD)**  
**Wednesday May 9 2012 at 6:00 PM Eastern**  
*(Notes to the moderator are in italics)*

**Overview**

Hello, I'm Elaine Chan from Pacific Consulting Group. I will moderate our discussion today. The topic we'll be discussing is your experience with the IRS office you visited recently and your feelings about the service you received. The overall goal of the research is to provide information that will help the IRS provide better service to customers like you. Specifically, we are working with the IRS to make changes to their local offices. Your input is very important for establishing the areas of the process that need improvement. This is your opportunity to have input and to tell the IRS what your experiences have been and to make recommendations for change.

First, I would like to thank all of you for calling in today. Our discussion will take about one hour. We would like to know your real attitudes and feelings, so please be as open and frank with us as you can. We would like for you to think about your opinions of the IRS with regard to your interactions with them and not your opinions regarding tax laws specifically. We are recording this session, and we have some IRS personnel listening in with us, but please keep in mind that our focus here is on your experiences and opinions, not on your individual identities.

I understand all of you received service at the IRS through the use of a computer monitor that provided video assistance from another IRS location. Is that correct? *[Thank and end call with anyone who does not meet this criterion]*

**Introductions**

*[Moderator: Gather responses in a roundtable fashion]*

To get started, let's introduce ourselves. Please tell us your first name and what office you visited.

**Virtual Service Delivery**

*[Moderator: Roundtable]*

- Did you know before you arrived at the IRS office that you were going to be serviced through video assistance?
- Can you share with me your experience with waiting in the lobby and how you understood who was next to receive service through the video assistance?
  - *[Probe:] Was there someone there to assist you?*
- What was your reaction when you saw the computer monitor?
- How would you compare video assistance to in-person assistance?
  - *[Probe:] How did it feel talking to a screen rather than a face-to-face assistor?*
  - *[Probe:] Did you like the computer assistance better, the same, or worse than face-to-face assistance?*
- How did you feel about the privacy during your visit?

- o *[Probe:]* How much privacy do you feel you need?
- o *[If negative, probe:]* Can you offer me any solutions on how to increase the privacy at the office you visited?
- Is there anything else about your experience with the video assistance that you haven't yet shared?

### **Reason for Visit**

*[Moderator: Roundtable]*

- What was the main reason for your visit?

### **Issue Resolution, Comparison to in-person assistance, and future VSD use**

*[Moderator: Roundtable]*

- Did the IRS representative resolve your issue or provide you with the assistance you needed to resolve your issue?
  - o *[If not, probe:]* What are your next steps?
  - o *[If not, probe:]* Do you think that you would have resolved everything you needed if you had face to face assistance rather than through the computer monitor and video assistance?
- If offered to you, would you be willing to use video assistance again during a future visit?
  - o *[If not or maybe, probe:]* Why wouldn't you be willing to use the video assistance? Is there anything the IRS could do to change your opinion?

### **Survey**

*[Moderator: Roundtable]*

- Did you complete a survey during your visit?
- For those of you who completed the survey, please describe how you were offered the survey (or knew about it), and how you went about completing and returning it.
- For those of you who didn't complete a survey, why did you choose not to complete it and could IRS do anything differently to encourage you to complete it?

### **Overall Improvement**

*[Moderator: Roundtable]*

- The last question I have concerns suggestions for improvement. Do you have any comments or suggestions regarding the video assistance you experienced?

### **Wrap Up**

Those are all the questions that I have for this session. I want to thank you and the IRS wants to thank you, for participating in this discussion. PCG will be sending a \$50 token of our appreciation in the mail within two weeks.