

Request for Approval for the Collection of Customer Feedback”
(OMB Control Number: 1545-1349)
Chinese and Spanish Tax Professional Focus Group

Attachment 1: Screener Guide
IRS W&I Multilingual and Agency Services
Chinese and Spanish Tax Professional Focus Group

Recruiting instructions:

- Recruiters will recruit using an intercept method. Information will be placed in the practitioners Tax Forum registration packages. Flyers will also be displayed at select Nationwide Tax Forums (New York City, Chicago, Las Vegas), and recruiters standing nearby will invite people to participate and sign their names on a sign-up sheet
- Recruit 10 participants for each group (for 8 to show per group)
- Recruit for two groups per city (one for Chinese LEP tax professionals and one for Spanish LEP tax professionals)
- Participants should be tax professionals that serve Chinese or Spanish LEP taxpayers

Hello, my name is _____. I work with PCG, a research and consulting firm in the Washington DC area. We are working with the Internal Revenue Service (IRS) to obtain feedback to obtain feedback from practitioners like yourself who prepare tax returns for Spanish and Chinese taxpayers. We are seeking participants for a focus group we are holding in [insert city]. Your participation is voluntary.

IF ASKED: (EACH INTERVIEWER WILL HAVE THIS INFORMATION)

This project has been approved by the U.S. Office of Management and Budget (OMB). The OMB Clearance Number is 1545-1349. If you like, I can give you a name and address where you can send comments and questions regarding these time estimates or suggestions for making this process simpler.

*Internal Revenue Service
Tax Products Coordinating Committee
1111 Constitution Ave, NW IR-6526
SE:W:CAR:MP:T:T:SP
Washington, DC 20024*

Your answers to these questions will be held completely private by PCG, meaning we will not provide your name or any identifying information to the IRS.

Screener Guide

Would you consider yourself to be fluent in English?

- () Yes Continue
() No Terminate

XXXXXXXXXXXXXXXXX Study
Participant Recruitment Guide **OMB # 1545-1349**

Are you a tax professional? (individual who prepares 25 or more Federal tax returns each year)

- Yes Continue
 No Terminate

Did you prepare 25 or more Federal tax returns for tax year 2011 for clients who speak primarily Spanish or Chinese?

- Yes Accept for focus group
 No Terminate

I'm glad that you will be able to join us! Attached is Focus Group participant tag to affix to your Tax Forum badge, please attach it to your badge so you will be allowed entrance to the Focus Group area. At this point I need to collect some contact information from you, I just need your name to place on the list of participants.

We are only inviting a few 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 [insert recruiter contact and phone] if this should happen. We look forward to having you participate on [insert day] at [insert time].

Do you have any questions?

Great! Thank you for your time and please remember to bring reading glasses if you use them.

TERMINATE TEXT

Thank you very much for your time, and thank you for answering our questions. Unfortunately, based on the focus group requirements, we cannot extend you an invitation. Perhaps at a later time we can include you in a future focus group. Have a good [day/evening].

Language for Flyer and recruitment package:

Improving IN-LANGUAGE IRS services for Chinese/ Spanish taxpayers and their preparers: We'd like your input!"

Join us for a discussion to:

- determine how to best improve existing services
- and how to identify what new services to develop (social media) for you and your customers
- how to develop best communication strategies for reaching these taxpayers (message and media).

Moderator's Guide
IRS W&I Multilingual and Agency Services

Chinese and Spanish Tax Professional Focus Group
Moderator's Guide

Hello! I'm (MODERATOR'S NAME) from Pacific Consulting Group and will be moderating today's group discussion. The purpose of this focus group is to discuss how we can better help you help serve Chinese/Spanish LEP taxpayers.

First, I would like to thank all of you for coming 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. Your comments and suggestions are very important to us and will be used to help the IRS improve services.

I am not an IRS employee, and I work for Pacific Consulting Group. I was hired to get your perceptions, opinions, and suggestions. There are no right or wrong answers; so please don't hold back. My job as a 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

Introductions -10 minutes

[Moderator: Gather responses in a roundtable fashion]

To get started, let's introduce ourselves. Please tell us your first name, and the types of taxpayers you serve (individuals, businesses, etc.)]

I. Discussion - Service Use and Needs 30 minutes

1. What resources do you currently use to help your Chinese or Spanish clients?
 - Do you use IRS resources? Which ones?
 - Elaborate on the resources used. How helpful are they? How could they be improved?

2. Have you contacted the IRS for tax help for your Chinese or Spanish customer in the last year? Now?
 - How did you contact the IRS?
 - Does the method of contacting the IRS depend on the issue you are contacting the IRS about? If so, what are some of the determining factors by issue?
 - Why did you use this (method) to deal with this issue?
 - What other factors affect your choice of method to contact the IRS?
 - What are some of the reasons you did you not choose alternative methods?
 - Did you find the information you were seeking? If not, how did you get your issue resolved?

- Please describe the nature of your interactions?
 - How would you rate the service you received?
 - What could be done to improve the service you received from the IRS?
3. Please tell me what services or information you would like to receive from the IRS to better help LEP taxpayers that you do not receive today.

II. Preferred Communication: 25 minutes

- How would you like to receive information about new IRS products and services for Chinese or Spanish taxpayers?
- What forms of social media do you use?
- Would you use social media to receive information about new IRS products and services for Chinese or Spanish taxpayers?
- Where do you advertise your services to Chinese or Spanish customers?

IV. Wrap-up – 5 minutes

We are getting close to the end of our time, but before we wrap up our session, is there anything the IRS can do to improve service to taxpayers like you?