

Attachment A

***IRS W&I Taxpayer Experience Survey
Phone Focus Group Recruiting Guide/Screenener and Reminder
June 4, 2012***

Note: Recruit 4 phone focus groups (recruit 9 for 6 to show per group)

INITIAL INVITATION

We would like to conduct some research on behalf of the IRS in the form of one-hour telephone focus groups to discuss improvements of IRS.gov online services and to help us identify new services that could help taxpayers like you. This is NOT a call about your specific tax return. Participation in the focus group will help the IRS improve service to taxpayers like you.

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 in the form of a check made out to you.

- 1. Are you interested in participating?
 Yes.....1 *[Continue]*
 No..... 2 *[Thank taxpayer for their time, and end call]*

- 2. Have you visited IRS.gov?
 Yes.....1 *[Recruit 2 groups of at least 6 per group]*
 No.....2 *[Recruit 2 groups of at least 6 per group]*

Thank you for answering those questions. The date and time for the session is *[State date and time for the group]*

We are delighted that you will participate in our group. The dial in number is: 1-877-668-4493. The access code is: xxxxxxxx.

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.

We would also like to give you a reminder call on the day of the focus group call. 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
SE:W:CAR:MP:T:T:SP
1111 Constitution Avenue NW
Washington, DC 20224

Thank you and have a nice day. We look forward to speaking with you on DAY DATE TIME.

-----end conversation-----

REMINDER CALL

This email is to remind you of your participation in the telephone focus group scheduled for (DAY DATE at TIME). The dial in number and access code numbers are (STATE FROM ABOVE). Do you have any questions? (PAUSE AND ANSWER QUESTIONS). Thank you in advance for your participation.

Attachment B

***IRS Wage and Investment
Taxpayer Experience Survey
Phone Focus Group Moderator's Discussion Guide
June 4, 2012***

OVERVIEW

Hello, I'm Elaine Chan from Pacific Consulting Group (PCG) and I'm moderating our discussion today. We'll be discussing your service needs from the IRS in helping you prepare and file your federal tax return. The goal of this research is to provide information that will help the IRS provide better service to customers like you. Your input is very important for identifying improvements of current IRS.gov online services as well as identifying new IRS.gov services. This is your opportunity to provide input 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. 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 your interactions with them and not your opinions regarding tax laws specifically. I am recording this session, and have some IRS personnel listening in, but please keep in mind that our focus here is on your experiences and opinions, not on your individual identities. In fact, none of us know more than your first name and results will be presented in summary form and not include any individual's information.

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. For those of you who are unfamiliar with focus group discussions, 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 management uses information from focus groups to improve its services.

My job as moderator is to:

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

I am required by law to give you the OMB control # for this public information request. That number is OMB 1545-1349.

In order for things to move along smoothly I have a few ground rules and general information that we need to follow:

- I'd like everyone to participate, so please speak loudly and one at a time.
- Please state your first name as you begin to speak so that everyone can more easily follow the conversation.

- You do not need to address all of your comments to me to get them on the table. You can respond directly to what someone else says.

INTRODUCTIONS

LET'S INTRODUCE OURSELVES. AS I CALL EACH PERSON'S FIRST NAME, PLEASE TELL US WHAT CITY AND STATE YOU ARE LOCATED IN AND WHETHER YOU PREPARE AND FILE YOUR OWN TAXES OR SEEK ASSISTANCE FROM A PAID TAX PREPARER OR UNPAID PREPARER, SUCH AS FAMILY MEMBERS OR FRIENDS.

IRS SERVICE AWARENESS AND USE

I'd like to focus our discussion on services that the IRS provides, specifically through the IRS website, IRS.gov. I'll ask each of you whether or not you have obtained information from IRS.gov in the last 12 months and what type of information you were seeking. Let's begin with *[Moderator, conduct roundtable]*

- Have you visited IRS.gov in the past 12 months?
- (If yes) For what reasons have you visited IRS.gov in the past 12 months?
- What online tools or services have you used on IRS.gov?
- Describe your most recent experience using IRS.gov and talk me what you did to locate the information and how easy it was to locate the information you were seeking.
- Did you find what you were looking for?

Future Applications

The IRS is interested in enhancing online services to better provide information that taxpayers need to effectively meet your tax obligations. You've shared with me the types of reasons for which you currently visit IRS.gov.

- I'm going to read a more comprehensive list of reasons for contacting the IRS. As I read each one, I'll call your names individually, and please tell me whether or not you would consider using IRS.gov for each issue. *[Read list, conduct roundtable]*

(If no to any issue, ask "Why would you not consider visiting IRS.gov to get help or information about this issue?")

- a. Get a **form or publication**
- b. Obtain transcripts or **prior year tax return information**
- c. Get help with **tax law** while **preparing** my return such as information on withholding, dependents, deductions, or tax credits
- d. Get **tax return preparation help** such as which forms to file, record keeping, filling out forms, how to file or how to get more help

- e. Get **tax law** information **after filing** my tax return to help me clarify the tax process or remain/become compliant such as information about estimated taxes (do *not* count contacts about IRS notices)
 - f. **Make a payment**
 - g. Get **information** about making **payments**
 - h. Get **information** about a **refund**
 - i. Obtain **Individual** or **Employer Tax ID** (ITIN, EIN)
- Earlier, you also told me the types of online tools you have used on IRS.gov. What other types online services or tools would you like to see made available on IRS.gov? (Unaided)
 - I'm going to read a list of online services/tools that are currently available or may be available in the future on IRS.gov. Tell me whether or not you would consider using each online service/tool assuming you have a need to obtain information provided by the tool. I'll call each individual's name after each tool and please say yes or no to whether or not you would consider using the online service. (Aided)
 - a. Electronic Federal Tax Payment System (EFTPS)
 - b. Electronic Filing PIN Request
 - c. Interactive Tax Assistant (ITA)
 - d. IRS Withholding Calculator
 - e. Online Employer Identification Number (EIN)
 - f. Online Payment Agreement (OPA)
 - g. Tax Exempt Charity Search
 - h. Tax Trails
 - i. Where's My Refund
 - j. Transcripts or prior year tax return info

Recommendations

- *Finally, what else can the IRS do to encourage you to rely more on using IRS.gov to perform tax-related activities?*

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. If, by chance, you do not receive the check in the mail or have any questions about it you can reach me, Elaine at 650.223.8222.

Thank you for participating and enjoy the rest of your day. Good bye.