

TAC Office: _____



READ TO EACH TAXPAYER:

We are looking for taxpayers who are willing to help with a research study. The study involves participating in a one-hour phone discussion on **Wednesday, May 6, 2015, at 12 pm Eastern time**. Participants will be paid \$50 for their participation. A toll-free telephone number will be provided for the call.

Would you be willing to participate?

If yes, read next paragraph and get their information – **do not show this to the taxpayer**

If no, thank the taxpayer

The meeting will include about 6 taxpayers and will be led by a professional moderator, contracted by the IRS. You will be asked to share your experience about your visit to this IRS office. You will not be asked about your tax situation and your identifying information will not be shared in the results. Taxpayers will receive \$50 for their participation in the one-hour call. Please note that participants are selected randomly from the list, so not all names will be contacted.

IRS Employee—please us the form below to capture taxpayer information.

NAME	Telephone Number
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TAC Office: _____

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READ TO EACH TAXPAYER:

We are looking for taxpayers who are willing to help with a research study. The study involves participating in a one-hour phone discussion on **Wednesday, May 6, 2015, at 3 pm Eastern time**. Participants will be paid \$50 for their participation. A toll-free telephone number will be provided for the call.

Would you be willing to participate?

If yes, read next paragraph and get their information – **do not show this to the taxpayer**

If no, thank the taxpayer

The meeting will include about 6 taxpayers and will be led by a professional moderator, contracted by the IRS. You will be asked to share your experience about your visit to this IRS office. You will not be asked about your tax situation and your identifying information will not be shared in the results. Taxpayers will receive \$50 for their participation in the one-hour call. Please note that participants are selected randomly from the list, so not all names will be contacted.

IRS Employee—please us the form below to capture taxpayer information.

NAME	Telephone Number
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TAC Office: _____

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TAC Office: _____



READ TO EACH TAXPAYER:

We are looking for taxpayers who are willing to help with a research study. The study involves participating in a one-hour phone discussion on **Thursday, May 7, 2015, at 6 pm Eastern time**. Participants will be paid \$50 for their participation. A toll-free telephone number will be provided for the call.

Would you be willing to participate?

If yes, read next paragraph and get their information – **do not show this to the taxpayer**

If no, thank the taxpayer

The meeting will include about 6 taxpayers and will be led by a professional moderator, contracted by the IRS. You will be asked to share your experience about your visit to this IRS office. You will not be asked about your tax situation and your identifying information will not be shared in the results. Taxpayers will receive \$50 for their participation in the one-hour call. Please note that participants are selected randomly from the list, so not all names will be contacted.

IRS Employee—please us the form below to capture taxpayer information.

NAME	Telephone Number
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TAC Office: _____

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**IRS W&I Field Assistance
Phone Focus Group Recruiting Guide and Reminder
May 2015**

[Recruiters: recruit a mix of participants based on Q3, and at least 3 respondents answering "yes" to question 4 for each focus group session.]

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 Wednesday, May 6 at Noon Eastern, May 6 at 3 pm Eastern, or Thursday, May 7 at 6 pm Eastern. 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 an IRS office. Is this correct?

_____ Yes *[Continue]*

_____ No - We are looking to speak with taxpayers who recently visited a local IRS office. Thank you.
[Thank and end call]

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

_____ Yes *[explain, thank, and then terminate the call]*

_____ No

3. In order to resolve your issue, did you try to contact the IRS via phone, the IRS government website, or only went to the TAC site?

_____ Yes, used phone or website *[note which method they used]*

_____ No, only went to the TAC site, did NOT use phone or website

4. Did you use a computer at the local IRS office rather than being assisted face-to-face by an IRS representative?

_____ Yes *[note]*

_____ No *[proceed to question 5]*

5. [Recruiter: note male or female]

_____ Male

_____ Female

6. [Recruiter: note TAC location]

LIST OF PARTICIPATING IRS TAC LOCATIONS WILL BE PROVIDED

The dial in number is: 1-877-668-4493

The access code is: XXXX (May 6 Noon EST)

XXXX (May 6 3 pm EST)

XXXX (May 7 6 pm 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:

Wednesday, May 6 at Noon Eastern

Wednesday, May 6 at 3 pm Eastern

Thursday, May 7 at 6 pm Eastern

For record keeping:

_____ **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 Assistance 2015 - Phone Focus Groups Confirmation Letter
May 6-7, 2015

[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 May XX at YY Eastern. 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)

Thanks,

IRS W&I Field Assistance
Phone Focus Group Moderator's Guide
May 6-7, 2015
(Notes to the moderator are in italics)

Overview

Hello, I'm [MODERATOR'S NAME] 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 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.

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.

[as a follow up, before moving on to the next person during the introductions]

I would also like to know how frequently you use computers or the Internet.

- Do you have access to the Internet?
- How frequently do you use the Internet?
- What is your comfort level with using computers?

IRS Services

[Moderator: Group discussion] Before we discuss your experience at the IRS office, I'd like to ask you about some other IRS resources that are available to assist you. This set of questions is open to the group.

- Before today, have you visited the IRS website at www.IRS.gov to get assistance with an issue?
 - o *[If yes]* Were you able to accomplish what you needed using the website?
 - o If not, why not?
- Would you use the IRS website (www.IRS.gov) to get assistance again in the future?
 - o Why or why not?
- What could IRS do to improve the IRS website to encourage you to visit the website to resolve your issue instead of going into an IRS office?

- Are you aware of resources such as free file on IRS.gov or Volunteer Income Tax Assistance (VITA) services for help preparing your tax forms?
 - o What are your thoughts about these services? Have you used them? Why or why not?

- Before today, have any of you tried to get assistance with an issue by calling the IRS's toll free phone line, emailing the IRS, and/or mailing the IRS a letter? Why or why not?

- o *[If yes,]* What was your experience with these resources? Were you able to get the assistance you needed? What else did you need?
- o *Would you use on of these methods again? Why or why not?*
- What prompted you to come for service at the IRS office instead of using a different IRS service such as the IRS website, IRS toll-free phone line, mail or email?
- Would you contact the IRS the same way again to get assistance in the future?
 - o Why or why not? What would you do differently?
- What could the IRS do to improve the IRS toll-free phone line, the email service, and/or the IRS mail service to encourage you to use these services instead of going into an IRS office?

Experience at Local IRS Office

Next, I'd like to ask each of you some questions about your visit to the local IRS office. *[Moderator: Roundtable]*

- Was this the first time you visited an IRS office or have you visited an IRS office before?
 - o *[If not first visit]* How many times have you visited an IRS office within the past 2 years?

[Moderator: Open Discussion]

Now, I'd like to open this up to the group.

- For those of you who have visited the office frequently, can you please tell me why you've gone more than once?
 - o Probes: follow up for same issue, multiple issues, preferred method of service, unaware of other services. If same issue was it for payments and/or forms?
- What could have been done to minimize the number of visits to resolve your issue?
- **Facilitated Self Assistance (FSA)** Did you use a computer at the local IRS office rather than being assisted face-to-face by an IRS representative?
 - o [If yes] Do you have any comments or suggestions regarding the IRS computers, including how your experience compared to in-person assistance?
 - o [If no] What was the main reason you did not choose to use the IRS computers?
 - o Did you see any posters or pamphlets while you were in the office explaining this service?
 - o Did you notice if there was an IRS person present to help visitors on the computers?

Issue Resolution

- Did the IRS representative resolve your issue or provide you with the assistance you needed to resolve your issue?
 - o *[If not]* Why didn't you get your issue resolved as needed?
- Did you have to contact the IRS office again to resolve your issue?
 - o Probe: if so, what method did you use to resolve your issue, TAC office, phone, email, mail or website?
- What could have been done to resolve your issue more quickly?
Probe: Consider both what you could have done and IRS.
- 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 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.