

IRS W&I
ACS Support, CSCO, ACS
Phone Focus Group Moderator's Guide
Draft March 4, 2015
(Notes to the moderator are in italics)

Group 1: ACS Support

Group 2: CSCO

Group 3: ACS

Recruit as many who owed IRS money as possible.

Recruit as many dissatisfied as possible, up to 6 per group.

Give link to Online Payment Agreement Scenario 1 before the group.

Overview

Hello, I'm _____ from an independent research firm named Pacific Consulting Group and I will moderate our discussion. Thank you all for dialing in today. The topic we'll be discussing is [ACSS/ACS: resolving collection issues] [CSCO: collection of taxes by the Internal Revenue Service after some sort of compliance review of individual tax information]. The overall goal of the research is to help the IRS provide better service to customers like you.

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 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 thoughts, opinions, and suggestions.

I am recording this session, and we have some IRS personnel listening in to hear your comments first-hand, but please keep in mind that our focus here is on your experiences and opinions. I will be summarizing your comments in a report for the IRS and will not report your individual identities. I want to emphasize that the IRS does not and will not know your individual identities.

Introductions (5)

[Moderator: Gather responses in a roundtable fashion]

To get started, let's introduce ourselves. Please tell us your first name only and what city and state you are located in.

CSCO/ACSS/ACS Process and Expectations (10)

[CSCO/ACSS]

1. [CSCO/ACSS] Is this the first time you have owed money to the IRS and received a notice?
2. I'd like each of you to briefly describe the process and steps you took to resolve your collection issue, from the time you first received a notice from the IRS to the time you resolved the issue. (Including calls, letters, faxes, etc.)
 - a. What was the issue that led to the IRS notice or letter?

[ACS] I'd like each of you to briefly describe what was the issue that led you to call the IRS?

3. [CSCO/ACSS] Did this process meet the expectations you had when you first received the notice? [ACS] Did this process meet the expectations you had when you first called the toll-free line?
 - a. What were your expectations?
 - b. If not, why not?
 - c. Were they met? If, not, how weren't they met?

Online Tool for Payment Agreement (25)

Now we'll discuss the online payment tool that we sent a sample of to you before the group.

4. Had any of you heard of this online tool at IRS.gov for making a payment agreement before we sent it to you?
 - a. If yes, have you used it?
 - i. If no, why not?
 - ii. If yes, did it work for you? Do you have any recommendations for improvements? Would you use it again in the future
5. Did you all receive the Sample Online Payment Tool (Scenario 1) we emailed? Please bring that up on your computer if you can access one right now. As you can see, this online tool allows you to apply for an installment agreement online if you cannot pay

your taxes in full. Please take a look at the tool again. Talk it through. Each page is a screen on IRS.gov and they progress one after the other as shown.

6. If you owed IRS money and couldn't pay immediately, would you use this tool?
 - a. If no, why not?
 - b. If yes, what is appealing about it?
7. Are there any areas of the tool that were confusing to you?
8. Do you have any recommendations for improving the tool?

Items with High Leverage (20)

Now we'll discuss the top areas for improvement from the customer satisfaction survey. I'll tell you what the top areas for improvement were after analysis of customer data and will ask you what went well for you and what could be improved for all taxpayers in each area.

ACS only

9. Knowledge of the representative
 - a. What went well in this area?
 - b. What could be improved?
10. How clearly the representative explained your issue
 - a. What went well in this area?
 - b. What could be improved?
11. Representatives willingness to help you with your issue
 - a. What went well in this area?
 - b. What could be improved?

ACSS only

12. Length of Process
 - a. What went well in this area?
 - b. What could be improved?
13. Explanation of why the IRS did or did not accept taxpayers documents
 - a. What went well in this area?
 - b. What could be improved?
14. Consistency of Information
 - a. What went well in this area?
 - b. What could be improved?

CSCO only

15. Total amount of time taken
 - a. What went well in this area?
 - b. What could be improved?

16. How well IRS kept you informed of your case status
 - a. What went well in this area?
 - b. What could be improved?
17. Explanation of actions taken by IRS
 - a. What went well in this area?
 - b. What could be improved?

Recommendations (5)

Finally, are there any other elements of service provided by the IRS regarding [ACSS/ACS: resolving collection issues] [CSCO: collection of taxes by the Internal Revenue Service after some sort of compliance review of individual tax information] that could be improved which we have not discussed?

Wrap Up

Those are all the questions that I have for this session. I and the IRS thank you for participating in this discussion. PCG will be sending a \$40 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 my colleague Lauren, at 650-223-8222.

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

**IRS W&I
Filing and Payment Compliance
Phone Focus Group Screener and Reminder
March 2015**

Note: Recruit 3 phone focus groups, one each for CSCO, ACSS, and ACS

RECRUITING INSTRUCTIONS:

For each group recruit 12 individuals, try to get as many dissatisfied as possible, up to 6 for each group

INITIAL CALL

Hello, I'm _____ and I'm calling from Pacific Market Research. May I please speak to _____?

During the past year you participated in an IRS customer satisfaction survey and indicated you would be interested in participating in future research efforts. We are calling to set-up a one-hour focus group phone call to discuss your interaction with the [CSCO: Collection Notice Operation of the IRS/ACSS: IRS' Automated Collection System Support/ACS: IRS' Automated Collection System]. 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.

First, can you confirm that you completed an IRS customer satisfaction survey **within the past year**?

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 \$40.

The focus group will be held via telephone on [insert day]. 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 [CSCO: Collection Notice Operation of the IRS/ACSS: the IRS' Automated Collection System Support process/ACS: the

IRS' Automated Collection System process]. You will not be asked about your specific tax situation, only about your experience with this process.

As part of the group, we will email you a 10-page PDF with a sample IRS online tool for you to review before and during the group. You will need to be able to view that during the group.

1. Are you interested in participating?

Yes.....1 [Continue]

No..... 2 [Thank taxpayer for their time, and end call]

2. The date and time for the session is:

- Group 1
- Group 2
- Group 3

3. [Recruiter: note male or female]

_____ Male

_____ Female

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

The access code is:

- Group 1
- Group 2
- Group 3

Before the discussion, we will be emailing you a sample online tool and we will discuss how useful it is. Please have that on hand for the discussion as well.

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

Respondent Name _____

Respondent Address _____

Respondent Email Address (REQUIRED) _____

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-----

For record keeping:

_____ Reminder call made day before group

_____ Reminder call 1 hour before group

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 (REFER TO DATE, TIME ABOVE). The dial in information is (REFER TO INFORMATION ABOVE). Have you received the information that was emailed for the discussion? (IF NOT, RESEND). Please have that on hand for the call. Do you have any questions? (PAUSE AND ANSWER QUESTIONS). Thank you in advance for your participation.



Sample OPA Scenario
for FG.pptx