

Below please find the confirmation emails that are sent to respondents.

Hi [first name],

This is a friendly reminder that you are confirmed for the IRS Feedback remote focus group session on **[day, month date at time]**. **At your earliest convenience, please confirm you will be attending your session.** If you are unable to attend, please contact me by responding to this email or by calling the number located in my signature.

Fors Marsh Group
1010 N Glebe Road Suite 510
Arlington, VA 22201
Desk: 571.858.3817
forsmarshgroup.com

Attachment A: Focus Group Recruiter's Guide

**IRS W&I Injured Spouse Customer Satisfaction Survey Focus Group OMB #: 1545-1349
Screener Guide**

- *One 60 minute focus group session total. Recruit 11 for 9 to show for total number of sessions.*

Use survey participants that have indicated that they are interested in participating in additional IRS-related research by providing their phone numbers and/or email addresses at the end of the Injured Spouse survey. We would like a mix of:

- *Survey participants who answered Very Dissatisfied or Dissatisfied to any of the following Injured Spouse Customer Satisfaction Survey questions (this information will be pulled from survey responses).*
 - 5. For the next set of questions, regardless of your satisfaction with the outcome of your issue, please focus on your interactions with the IRS regarding the instructions for preparing Form 8379, Injured Spouse Allocation. C. The IRS representatives' knowledge of the Injured Spouse process? **(Q5C)***
 - 8. For the next set of questions, regardless of your satisfaction with the outcome of your issue, please focus on your interactions with the IRS regarding the outcome of your case. D. The IRS representatives' knowledge of the Injured Spouse process? **(Q8D)***
 - 23. Regardless of the outcome of your case, how much do you agree with the following statements? D. I was treated with respect during the Injured Spouse process **(Q23D)***

Online Screener

Welcome page:

Fors Marsh Group, an applied research firm based in Arlington, Virginia, is working with the IRS to conduct focus groups to receive feedback on how to help improve their customer service. You had some correspondence with the IRS regarding your tax return or amended return, and we received your contact information from the survey that you had completed last year or earlier this year. Your identity will not be shared with the IRS or other agencies. We would like to ask you a couple of questions to see if you qualify for this study. Your participation is voluntary, but your help on this project would be very much appreciated.

We are holding one 60 minute focus group over the phone on **[Dates TBD]** with people who have completed the survey and we wanted to see if you would be able to help by providing your feedback on your experience, your compensation would be \$75.

Thank you for your interest.

The Paperwork Reduction Act required that IRS provide an OMB Control Number on all approved public information requests. That number is OMB 1545-1349. You may send comments and questions regarding this process or suggestions for making it simpler.

Special Services Section
1111 Constitution Avenue, NW,
SE:W:CAR:MP:T:M:S - Room 6129
Washington DC 20224.

//Page break//

1. Are you interested in participating in this study?

- 1 Yes (Continue)
- 2 No (Thank and Terminate)

//Page break//

2. Do you recall calling an IRS customer service representative either regarding your Injured Spouse Allocation (Form 8379) or the outcome of your case?

- 1 Yes (Continue)
- 2 No (Thank and Terminate)

//Page break//

3. Do you feel that you can recall this experience well enough to answer some detailed questions about your experience?

- 1 Yes (Continue)
- 2 No (Thank and Terminate)

//Page break//

4. Do you have a cell phone or landline to call in to the focus group?

- 1 Yes (Continue)
- 2 No (Thank and Terminate)

//Page break//

5. Into which of the following categories does your age fall? [Select one]

- 1 Less than 18 (Continue)
- 2 18 to 33 (Continue)
- 3 34 to 44 (Continue)

- 4 45 to 64 (Continue)
- 5 65 and older (Continue)

//Page break//

6. What was your filing status on your most recent tax return? [Select one]
- 1 Single (Continue)
 - 2 Married/jointly (Continue)
 - 3 Head of household (Continue)
 - 4 Widow/widower (Continue)

//Page break//

7. *Are you of Hispanic or Latino origin (ethnicity)?*
- 1 *Yes*
 - 2 *No*

8. *What is your race? Please select one or more. Are you... [Accept all Multiple Answers]*
- 3 *White*
 - 4 *Black or African American*
 - 5 *Asian*
 - 6 *Native Hawaiian or other Pacific Islander*
 - 7 *American Indian or Alaskan Native*

//Page break//

7. Which of these categories does your total annual household income fall into? [Select one]
- 1 Less than \$10,000 (Continue)
 - 2 \$10,000 but less than \$15,000 (Continue)
 - 3 \$15,000 but less than \$25,000 (Continue)
 - 4 \$25,000 but less than \$35,000 (Continue)
 - 5 \$35,000 but less than \$50,000 (Continue)
 - 6 \$50,000 but less than \$75,000 (Continue)
 - 7 \$75,000 but less than \$100,000 (Continue)
 - 8 \$100,000 or more (Continue)

//Page break//

8. Please identify your highest completed level of education? [Select one]
- 1 Less than 9th grade (Continue)
 - 2 9th grade to 12th grade, no diploma (Continue)
 - 3 High school graduate (GED) (Continue)

- 4 Some technical or vocational school (Continue)
- Technical or vocational school graduate (Continue)
- 5 Some college, no degree (Continue)
- 6 Associate degree (Continue)
- 7 Bachelor's Degree (Continue)
- 8 Master's degree (Continue)
- 9 Post-Master's degree (Continue)

//Page break//

- 9. What is your gender? [Select one]
- 1 Male (Continue)
- 2 Female (Continue)

//Page break//

//If participant does not qualify – Termination page//

Thank you very much for your time, and thank you for answering our questions. Unfortunately, based on the requirements, we cannot extend you an invitation. We will let you know though about future participation opportunities as they become available.

//Page break//

This study will take about 60 minutes to complete and we will give you a \$75.00 check for your time. We would like to go ahead and get some times that will work for your participation in the focus group.

Would you please provide us with your name, phone number and email address so that we can contact you with the time, send you a reminder and instructions?

[First & Last Name]
[EMAIL]
[Phone Number]

//Page break//

Thank you for completing this questionnaire. A researcher will contact you shortly to schedule the focus group time.

Phone Screener

Hello, my name is _____. I'm a researcher working with the IRS and we are conducting focus groups to receive feedback on how to help improve their customer service.

You had some correspondence with the IRS regarding your Injured Spouse Allocation, and we received your contact information from the survey that you had completed in 2015. Your identity will not be shared with the IRS or other agencies. We would like to ask you a couple of questions to see if you qualify for this study. Your participation is voluntary, but your help on this project would be very much appreciated.

We are holding one 60 minute focus group over the phone on [Dates TBD] with people who had completed the survey and we wanted to see if you would be able to help by providing your feedback on your experience, your compensation would be \$75.

Note to recruiter: If respondent asks where we got their contact info from tell them: “At the end of the Injured Spouse Customer Satisfaction survey, you were given the option to provide your contact information if you were interested in participating in future research.”

1. Are you interested in participating in this study?

- 1 Yes (continue)
- 2 No (Thank and Terminate)

2. Do you recall calling an IRS customer service representative either regarding your Injured Spouse Allocation (Form 8379) or the outcome of your case?

- 1 Yes (Continue)
- 2 No (Thank and Terminate)

3. Do you feel that you can recall this experience well enough to answer some detailed questions about the process?

- 1 Yes (continue)
- 2 No (Thank and Terminate)

4. Do you have a cell phone or landline to call in to the focus group?

- 1 Yes (continue)
- 2 No (Thank and Terminate)

5. Into which of the following categories does your age fall? [Select one]

- 1 Less than 18 (Continue)
- 2 18 to 33 (Continue)
- 3 34 to 44 (Continue)
- 4 45 to 64 (Continue)
- 5 65 and older (Continue)

6. What was your filing status on your most recent tax return? [Select one]

- 1 Single (Continue)

- 2 Married/jointly (Continue)
- 3 Head of household (Continue)
- 4 Widow/widower (Continue)

7. Are you of Hispanic or Latino origin (ethnicity)?

- 8 Yes
- 9 No

8. What is your race? Please select one or more. Are you... [Accept all Multiple Answers]

- 1 White
- 2 Black or African American
- 3 Asian
- 4 Native Hawaiian or other Pacific Islander
- 5 American Indian or Alaskan Native

9. Which of these categories does your total annual household income fall into? [Select one]

- 1 Less than \$10,000 (Continue)
- 2 \$10,000 but less than \$15,000 (Continue)
- 3 \$15,000 but less than \$25,000 (Continue)
- 4 \$25,000 but less than \$35,000 (Continue)
- 5 \$35,000 but less than \$50,000 (Continue)
- 6 \$50,000 but less than \$75,000 (Continue)
- 7 \$75,000 but less than \$100,000 (Continue)
- 8 \$100,000 or more (Continue)

10. Please identify your highest completed level of education? [Select one]

- 1 Less than 9th grade (Continue)
- 2 9th grade to 12th grade, no diploma (Continue)
- 3 High school graduate (GED) (Continue)
- 4 Some technical or vocational school (Continue)
- Technical or vocational school graduate (Continue)
- 5 Some college, no degree (Continue)
- 6 Associate degree (Continue)
- 7 Bachelor's Degree (Continue)
- 8 Master's degree (Continue)
- 9 Post-Master's degree (Continue)

11. What is your gender? [Select one]

- 1 Male (Continue)
- 2 Female (Continue)

If respondent qualifies for the study:

This study will take about 60 minutes to complete and we will give you a \$75.00 check for your time. We would like to go ahead and sign you up for the focus group. Would you be available to participate in a focus group on [Provide Options]?

Would you please provide us with your phone number and email address so that we can send you a reminder and instruction?

[EMAIL]
[Phone Number]

I would like to confirm your address as well in order to send your compensation.

[Confirm Address]

The Paperwork Reduction Act required 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 a name and address where you can send comments and questions regarding this process or suggestions for making it simpler.

[Provide the following information only if respondent asks for address:]

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

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

NOTE: If they ask, we will be mailing a check to them after they complete their session. Checks will be mailed out the day following the focus group.

ATTACHMENT B: FOCUS GROUP MODERATOR'S GUIDE***IRS W&I Injured Spouse Customer Satisfaction Survey Focus Group******Moderator's Guide*****Welcome and Topic Introduction 5 Minutes**

Hello, I'm <MODERATOR>, and I am a researcher with Fors Marsh Group. We receive feedback from people, like you to help make products, services, and organizations better.

We've asked you here today to discuss the IRS's Injured Spouse process specifically, when contacting the IRS over the phone.

I want to let you know that I'm not an expert on the topics we will be discussing. I am not employed by the IRS, so please do not feel like you have to hold back on your thoughts to be polite to me. I'm interested in both your positive and negative reactions to the process. My job as a moderator is to:

- Help guide the flow of conversation
- Ensure that questions about various aspects of the topic are covered

There are a few things I'd like to go over to help make our discussion more productive:

- I have a discussion guide in front of me that includes all the points of discussion I need to raise, and helps me keep the discussion on track. It is important that we cover all the topics. Therefore, I may have to break off the conversation in order to move on to another area in the guide.
- We are audio recording this session for use in preparing a report with our findings. Because we are recording this meeting, I ask that you speak loudly and clearly.
- Please speak one at a time and try not to engage in any side conversations during the discussion. I want to hear what everyone has to say – either today or when I go back to listen to the audio files to write up the report.

- I want to hear from everyone, but not every person has to answer every question.
- I want to hear a range of experiences, so if you have an opinion different from what most in the group are saying, please don't hesitate to speak up - there are no right or wrong answers.

We have a few more things to cover before we get started:

- Your contributions to our discussion will be private to the extent allowed by law, and your names will not appear in the summary report. Likewise, we will not share any of our discussion from today with others who are not actively working on this project.
- Some people from my team as well as the IRS may be listening in remotely. They want to hear what you have to say about the topics we'll discuss, so please do not feel constrained by their presence.
- Your participation is voluntary. Therefore, at any point in time you may leave the meeting room. And you can choose not to answer any question you do not wish to answer.

Are there any questions about anything I've said so far?

[Allow participants to introduce themselves. Ask first name and what they plan to do for the weekend.]

Section 2: Questions and Discussion

1. Opening questions *5 Minutes*

- Let's start by having everyone say a little bit about what prompted you to file an Injured Spouse Allocation (Form 8379).
 - What was your experience like with the Injured Spouse process?
- For the next set of questions, regardless of your satisfaction with the outcome of your issue, please focus on your interactions with the IRS regarding the instructions for preparing Form 8379, Injured Spouse Allocation. C. The IRS representatives' knowledge of the Injured Spouse process? **(Q5C)**

For the next set of questions, regardless of your satisfaction with the outcome of your issue, please focus on your interactions with the IRS regarding the outcome of your case. D. The IRS representatives' knowledge of the Injured Spouse process? **(Q8D)** *30 Minutes*

- a. Let's have everyone say how many times you called the IRS throughout the Injured Spouse process, and tell us why you called.
- b. Was calling the IRS your first course of action when you realized you had questions about the Injured Spouse process?
 - i. *[IF NO]* What else did you do before calling?
- c. What were your expectations when you called the IRS?
- d. How was your experience with interacting with the IRS representative on the phone?
 - i. *Possible probes:* How did your interaction with the Customer Service Representative meet or fall below your expectations? What happened during the call? What kinds of information were you hoping to obtain? What information did you receive? How knowledgeable was the IRS representative? Were there any knowledge gaps? Did you have any questions that the representative couldn't answer? Was there anything that made the process difficult to get the information you needed?
- e. Can you describe how you felt once the call ended?
 - i. *Possible probes:* Did you complete the call with a resolution to your question? Did you complete the call knowing what to do next? Did you feel you were treated with respect throughout the call?
- f. What would have made it easier to get the answer to your question?

Section 3: Debriefing Questions

Closing question *5 Minutes*

1. Were there any other aspects about your experience with the Injured Spouse process that were not discussed in this focus group?

Thank you for participating. This has been very informative and helpful. We will be sending out your incentives in the mail tomorrow.