

## Consent Form for Taxpayer Focus Groups

# **CONVENIENT AND EFFICIENT SERVICE IN THE FUTURE STATE: GATHERING TAXPAYER AND STAKEHOLDER FEEDBACK FOR TRANSCRIPTS - TAXPAYER FOCUS GROUP**

Welcome Page:

You are being asked to participate in a focus group regarding your experience with the IRS tax transcript process. This information sheet describes the purpose, procedures, benefits, risks and precautions of the focus group. It also describes your right to withdraw from the group at any time. A member of the Fors Marsh Group team is available to read through this information sheet with you and discuss all the information, if you wish. (Continue)

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### **Why is this focus group being done?**

This focus group is being done to receive feedback from taxpayers who have previously requested tax transcripts from the IRS. The feedback from the focus group may help improve IRS services associated with tax transcripts.

### **What do I need to know about this focus group?**

This opportunity is being offered to taxpayers who have previously requested tax transcripts from the IRS and are willing to share information about their experiences. The focus group will last 60 minutes and you will speak with a moderator and other taxpayers over the phone. The focus group will be audio recorded and individuals' names will not be used in any description of findings.

Participants are expected to discuss their experience, thoughts, and opinions about the IRS tax transcript process. Other staff and the IRS employees may listen to the focus group remotely.

### **What are the potential risks of participating in this focus group?**

There are no known risks associated with this focus group. Participants will complete the focus group over the phone, sharing their experiences, opinions, and thoughts regarding the tax transcript process. You do not have to answer any questions that you do not wish to answer. We will only be using first names in the focus group. Your name will not be used in any reports and no quotes will be associated with your identity.

### **Does participating in this focus group provide any benefit?**

Participants will be compensated \$80 for their participation in the focus group. The feedback from the focus group may help improve IRS tax transcripts services .

### **Will it cost me anything to participate in focus group?**

There are no costs for you to participate in the focus group.

### **Do I have to participate in this focus group?**

Your participation is absolutely voluntary. There are no penalties associated with refusal to participate; however your participation is encouraged so as to get a wider range of feedback from taxpayers.

### **Who will have access to the recordings from the focus group and/or contact information?**

Only the staff working on this project will have access to the audio recordings from the focus group. Only the participant recruiters will have access to your contact information.

**Who do I contact if I have questions about the IRS Transcripts Taxpayers Focus Group?**

If you have questions or concerns about the focus group, you can contact Julie Brown at Fors Marsh Group, ux@forsmarshgroup.com, 571-858-3776. (Continue)

//Page break//

Your signature below indicates that you understand the conditions stated above and agree to participate in this focus group.

[Open text field]

Signature:

[Open text field]

Date:

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. The time estimated for your participation is 60 minutes. If you have any comments regarding the time estimates associated with this study or suggestions on making this process simpler, please write to the Internal Revenue Service, Special Services Section, SE:W:CAR:MP:T:M:SP, Room 6129, 1111 Constitution Ave., NW, Washington, DC 20224.

## **Screener for Taxpayer Focus Groups**

### ***Convenient and Efficient Service in the Future State: Gathering Taxpayer and Stakeholder Feedback for Transcripts – Taxpayer Focus Groups OMB #:***

#### **Screener Guide**

*As proposed, three 60-minute focus group sessions with six participants each to discuss the future state of the tax transcript request process.*

*Use taxpayers who have previously requested transcripts in the past 12 months and who are willing to share information about their experiences requesting transcripts.*

#### **Phone Screener**

Hello, my name is \_\_\_\_\_. I'm a researcher from Fors Marsh Group and I'm working with the IRS to conduct focus groups to receive feedback from taxpayers who have previously requested tax transcripts in the past 12 months. We would like to ask you a few questions to see if you qualify for this study. Your identity will not be shared with the IRS or other agencies. Your participation is voluntary, but your help on this project would be very much appreciated.

We are holding 60-minute focus group sessions over the phone with taxpayers who have requested tax transcripts from the IRS in the past 12 months and we wanted to see if you would be able to help by providing feedback on your experience. Compensation will be provided for your time.

1. Are you interested in participating in this study?

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

[Multi-punch]

2. Are you available on one of the following dates and times to participate in this study?  
[Accept all Multiple Answers]

- |   |                                      |                       |
|---|--------------------------------------|-----------------------|
| 1 | [Date #1, time]                      | (Continue)            |
| 2 | [Date #2, time]                      | (Continue)            |
| 3 | [Date #3, time]                      | (Continue)            |
| 4 | Not available for any of these dates | (Thank and Terminate) |

3. Have you requested a tax transcript from the IRS in the past 12 months?

**Note to recruiter:**  *If a participant asks to clarify the meaning of transcripts, give examples of types: tax return transcript, tax account transcript, record of account transcript, wage and income transcript, or verification of non-filing letter.*

- |   |     |            |
|---|-----|------------|
| 1 | Yes | (Continue) |
|---|-----|------------|

2 No (Thank and Terminate)

4. What was your reason for requesting a tax transcript from the IRS in the past 12 months?

**Note to recruiter:** Adequate reasons for requesting tax transcripts include verification of income for FAFSA, mortgage companies, charities, Department of State, etc.

5. Do you feel that you can recall the transcript request process well enough to answer some detailed questions about your experience?

1 Yes (Continue)

2 No (Thank and Terminate)

6. Do you have a cell phone or landline to call into the focus group?

1 Yes (Continue)

2 No (Thank and Terminate)

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

1 Less than 18 (Continue)

2 18 to 24 (Continue)

3 25 to 34 (Continue)

4 35 to 44 (Continue)

5 45 to 54 (Continue)

6 55 to 64 (Continue)

7 65 and older (Continue)

8. 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)

9. Are you of Hispanic or Latino origin?

1 Yes (Continue)

2 No (Continue)

10. What is your race? Please select one or more. Are you...

1 White (Continue)

2 Black or African American (Continue)

3 Asian (Continue)

- 4 Native Hawaiian or other Pacific Islander (Continue)
- 5 American Indian or Alaskan Native (Continue)

11. 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)

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

13. 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 you will be compensated for your time. We would like to go ahead and sign you up for the focus group.

Could you please provide us with your email address so that we can send you a reminder with instructions?

[Email]

Could you also please provide us with your address so we can send you your compensation?

[Address]

The Paperwork Reduction Act requires that the 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  
Special Services Section  
SE:W:CAR:MP:T:M:SP, Room 6129  
1111 Constitution Avenue, NW  
Washington DC 20224.

Thank you and have a nice day. We look forward to speaking with you soon.

**Reminder Email: Taxpayer Focus Groups**

From: [FocusGroup@ForsMarshGroup.com](mailto:FocusGroup@ForsMarshGroup.com)

To: [taxpayer provided e-mail address]

Subject: Reminder for Upcoming Focus Group Participation

Dear [Insert Taxpayer's Name]:

We are reaching out in this email message to remind you of your scheduled participation in a focus group on [Insert Date and Time]. In order to participate in the scheduled focus group please call [insert phone number for focus group].

We are holding 60-minute focus group sessions over the phone with taxpayers who have requested tax transcripts from the IRS in the past 12 months and we wanted to see if you would be able to help by providing feedback on your experience. Compensation will be provided for your time.

If you have any questions, please feel free to contact us at [FocusGroup@ForsMarshGroup.com](mailto:FocusGroup@ForsMarshGroup.com).

Thank you and I look forward to your participation.

[Insert Name]  
Director of Research  
Fors Marsh Group

## **Focus Group Moderator's Guide**

### ***IRS W&I Transcript Feedback 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 tax transcript process, specifically requesting a tax transcript and how it is used.

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 hang up and end the phone call. And you can choose not to answer any question you do not wish to answer.
- Since we have multiple people on the phone, please state your first name when you have something to say so I know who I'm speaking with.

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 request a tax transcript from the IRS.
- There are multiple types of tax transcripts that can be requested, do you remember which type you requested? *[Tax Return, Tax Account, Record of Account, Wage and Income, Verification of Non-filing Letter Transcripts]*
- How many times have you requested tax transcripts in the past?

### 2. Transcript Request *45 Minutes*

- a. What organization(s) required your transcript?
- b. How did you go about requesting the transcript?
  - i. In person? Why?
  - ii. Online? Why?
  - iii. Mail? Why?
  - iv. Phone? Why?
- c. What is your preferred method?
- d. What was easy about requesting a transcript?
- e. What was difficult about requesting a transcript?
- f. Were there any occurrences specific to your case that might have made it difficult for you to receive a transcript? For example perhaps you were a victim of identity theft.
- g. Overall, how do you feel about the tax transcript request process?
  - i. *[Probe]* If you could improve the request process, how would you change

### **3. Transcript Format**

- a. How do you feel about the amount of information on the tax transcripts?
- b. How do you feel about the clarity of information on the tax transcripts?
- c. Which information from the transcript was most important to you?
- d. How do you feel about how the information is presented on the tax transcripts?
- e. If you could improve the format of the transcript to do your job better, how would you alter it?

### **4. Transcript Delivery**

- a. How long did it take the transcript to arrive?
  - i. Do you feel like this is an appropriate amount of time to receive a tax transcript?
  - ii. [If no] How long should it take for tax transcripts to arrive?
- b. How did you receive your transcript?
  - i. *[Probe]* If you received your transcript by mail, is there another method of delivery that you would have preferred instead?

### **5. Overall Experience**

- a. Overall, how would you evaluate your experience with the tax transcript process?
  - i. *[Probe]* What could have made the process easier?

## Section 3: Debriefing Questions

### **Closing question**    *5 Minutes*

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

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. The time estimated for your participation is 60 minutes. If you have any comments regarding the time estimates associated with this study or suggestions on making this process simpler, please write to the Internal Revenue Service, Special Services Section, SE:W:CAR:MP:T:M:SP, Room 6129, 1111 Constitution Ave., NW, Washington, DC 20224.

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

## **Consent Form for Stakeholder Interviews**

# **CONVENIENT AND EFFICIENT SERVICE IN THE FUTURE STATE: GATHERING TAXPAYER AND STAKEHOLDER FEEDBACK FOR TRANSCRIPTS - STAKEHOLDER IN-DEPTH INTERVIEWS**

Welcome Page:

You are being asked to participate in an individual interview regarding your experience with the IRS tax transcript process. This information sheet describes the purpose, procedures, benefits, risks and precautions of the individual interview. It also describes your right to withdraw from the study at any time. A member of the Fors Marsh Group team is available to read through this information sheet with you and discuss all the information, if you wish. (Continue)

//Page break//

### **Why is this interview being done?**

This individual interview is being done to receive feedback from third-party stakeholders on the tax transcript service that the IRS provides. The feedback from the individual interview may help improve IRS services associated with tax transcripts.

### **What do I need to know about this interview?**

This opportunity is being offered to third-party stakeholders who require tax transcripts from the IRS as a pre-requisite for various services. The interview will last 60 minutes and you will speak with an interviewer over the phone. The interview will be audio recorded and your name will not be used in any description of findings.

Participants are expected to discuss their experiences, thoughts, and opinions about the IRS tax transcript process. Other staff and the IRS employees may listen to the interview remotely.

### **What are the potential risks of participating in this interview?**

There are no known risks associated with this interview. Participants will complete the interview over the phone, sharing their experiences, opinions, and thoughts regarding the tax transcript process. You do not have to answer any questions that you do not wish to answer. We will only be using first names in the interview. Your name will not be used in any reports and no quotes will be associated with your identity.

### **Does participating in this interview provide any benefit?**

Participants will be compensated \$120 for their participation in the interview. The feedback from the interviews may help improve future service delivery of IRS tax transcripts.

### **Will it cost me anything to participate in interview?**

There are no costs for you to participate in the interview.

### **Do I have to participate in this interview?**

Your participation is absolutely voluntary. There are no penalties associated with refusal to participate; however your participation is encouraged so as to get a wider range of feedback from stakeholders.

### **Who will have access to the recordings from the interview and/or contact information?**

Only the staff working on this project will have access to the audio recordings from the interview. Only the participant recruiters will have access to your contact information.

**Who do I contact if I have questions about the IRS Transcripts Stakeholder In-depth Interview?**

If you have questions or concerns about the interview, you can contact Julie Brown at Fors Marsh Group, ux@forsmarshgroup.com, 571-858-3776.

//Page break//

Your signature below indicates that you understand the conditions stated above and agree to participate in this interview.

[Open text field]

Signature:

[Open text field]

Date:

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. The time estimated for your participation is 60 minutes. If you have any comments regarding the time estimates associated with this study or suggestions on making this process simpler, please write to the Internal Revenue Service, Special Services Section, SE:W:CAR:MP:T:M:SP, Room 6129, 1111 Constitution Ave., NW, Washington, DC 20224.

## **Screeners for Stakeholder Interviews**

### ***Convenient and Efficient Service in the Future State: Gathering Taxpayer and Stakeholder Feedback for Transcripts – Stakeholder Individual Interviews OMB #:***

#### **Screeners Guide**

*As proposed, 60-minute individual interviews with 17 participants to discuss the future state of the tax transcript request process.*

*Use third-party stakeholders (e.g., mortgage companies, private lenders, local mortgage branches, charity organizations) who require tax transcripts as a prerequisite for various services and who are willing to share information about their experiences with the transcript process.*

#### **Online Screener**

Welcome page:

Fors Marsh Group, an applied research firm based in Arlington, Virginia, is working with the Internal Revenue Service (IRS) to conduct interviews to receive feedback from third-party stakeholders who require tax transcripts as a prerequisite for various services. We would like to ask you a few questions to see if you qualify for this study. Your identity will not be shared with the IRS or other agencies. Your participation is voluntary, but your help on this project would be very much appreciated.

We are holding 60-minute interviews by phone with third-party stakeholders who have requested tax transcripts from IRS on behalf of taxpayers, who require transcripts for various services, or who are familiar with the tax transcript request process. We wanted to see if you would be able to help by providing your feedback on your experience. Compensation will be provided for your time.

Thank you for your interest.

The Paperwork Reduction Act requires that the 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 to the following name and address:

Internal Revenue Service  
Special Services Section  
SE:W:CAR:MP:T:M:SP, Room 6129  
1111 Constitution Avenue, NW  
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. Does your company or organization require tax transcripts (e.g., tax return transcript, tax account transcript, record of account transcript, wage and income transcript, or verification of non-filing letter) for various services?

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

//Page break//

- 3. Do you feel that you can recall the transcript request process well enough to answer some detailed questions about your experiences?

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

//Page break//

- 4. Do you have a cell phone or landline to call into the interview?

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

//Page break//

[Multi-punch]

- 5. What industry do you work in?

- 1 Education (e.g., Free Application for Federal Student Aid (FAFSA), financial aid, college/university) (Continue)
- 2 Finance (e.g., mortgage broker, banks, loans, credit cards) (Continue)
- 3 Government (e.g., Department of State, county/city) (Continue)
- 4 Charitable organization (Continue)
- 5 Other [fill in the blank] (Continue)

//Page break//

[Open text field]

- 6. What is the name of your organization or company? (Continue)

//Page break//

[Open text field]

7. What is your job title? (Continue)

//Page break//

8. Are you of Hispanic or Latino origin?

1 Yes (Continue)

2 No (Continue)

//Page break//

9. What is your race? Please select one or more. Are you...

1 White (Continue)

2 Black or African American (Continue)

3 Asian (Continue)

4 Native Hawaiian or other Pacific Islander (Continue)

5 American Indian or Alaskan Native (Continue)

//Page break//

10. What is your gender? [Select one]

1 Male (Continue)

2 Female (Continue)

//Page break//

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

1 Less than 18 (Continue)

2 18 to 24 (Continue)

3 25 to 34 (Continue)

4 35 to 44 (Continue)

5 45 to 54 (Continue)

6 55 to 64 (Continue)

7 65 and older (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 to participate. We will let you know about future participation opportunities as they become available.

//Page break//



This interview will take about 60 minutes to complete and you will be compensated for your time.

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

[First & Last Name]

[Email]

[Phone Number]

Could you also please provide us with your address in order to receive your compensation?

[Address]

//Page break//

Thank you for completing this questionnaire. A researcher will contact you shortly to schedule your interview.

**Reminder Email: Third Party Interview**

From: [Interview@ForsMarshGroup.com](mailto:Interview@ForsMarshGroup.com)

To: [Third Party provided e-mail address]

Subject: Reminder for Upcoming Interview

Dear [Insert Third Party Contact's Name]:

We are reaching out in this email message to remind you of your scheduled participation in an interview on [Insert Date and Time]. We will be contacting you at [Third Party provided contact phone number]. If there is a different contact number that you prefer, please reply with that information.

We are holding 60-minute interviews by phone with third-party stakeholders who have requested tax transcripts from IRS on behalf of taxpayers, who require transcripts for various services, or who are familiar with the tax transcript request process. Compensation will be provided for your time.

If you have any questions, please feel free to contact us at [Interview@ForsMarshGroup.com](mailto:Interview@ForsMarshGroup.com).

Thank you and I look forward to your participation.

[Insert Name]  
Director of Research  
Fors Marsh Group

## **In-depth interview Guide**

### ***IRS W&I Transcript Feedback In-depth Interviews***

#### ***Interviewer's Guide***

##### **Welcome and Topic Introduction 5 Minutes**

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

We've asked you here today to discuss the IRS's tax transcript process, specifically requesting a tax transcript and how it is used.

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 interviewer 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, reo 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.

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

- Your feedback will be private to the extent allowed by law, and your name 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 hang up and end the phone call. And you can choose not to answer any question you do not wish to answer.

Do you have any questions about anything I've said so far?

## Section 2: Questions and Discussion

### 1. Opening questions *5 Minutes*

- a. Let's start by saying a little bit about your job.
  - i. What industry do you work in?
    1. How long have you worked in this industry?
  - ii. What organization do you work for?
  - iii. Have you worked for any other organization(s) that required you to request tax transcripts to do your job?
- b. There are multiple types of tax transcripts that can be requested from the IRS; which type do you deal with most often? [*Tax Return, Tax Account, Record of Account, Wage and Income, Verification of Non-filing Letter Transcripts*]
  - i. How often do you request tax transcripts as part of your job?
  - ii. Are there cases that require you to request multiple types of tax transcripts?

### 2. Transcript Request *45 Minutes*

- a. What is the main reason your organization requests transcripts?
  - i. [*Probe*] Are there any additional reasons your organization requests tax transcripts? If so, what are they?
- b. Who does your organization request tax transcripts from?
  - i. Do you request transcripts from all customers or specific subset of customers?
- c. What is your organization's preferred method to request transcripts?

- i. Does your organization directly request transcripts from the IRS or does your organization request them from the taxpayer?
  - d. What is your organization's preferred method of receiving transcripts?
    - i. In person? Why?
    - ii. Online? Why?
      - 1. *[Probe]* What site do you use to request transcripts online?
    - iii. Mail? Why?
    - iv. Phone? Why?
      - 1. *[Probe]* Where did you find this phone number?
      - 2.
  - e. Have you or your organization experienced problems with any transcript request methods you use?
  - f. Overall, how do you feel about the tax transcript request process?
    - i. *[Probe]* If you could improve the request process, how would you change it?

### 3. Transcript Format

- a. How do you feel about the amount of information on the tax transcripts?
- b. How do you feel about the clarity of information on the tax transcripts?
- c. How comfortable do you feel using the tax transcripts to find the information you need to do your job?
- d. Which information from the tax transcript is most important to do your job?
  - i. How difficult is it to locate the information on the tax transcript that you need to do your job?
- e. Is there information on the transcript that isn't needed at all by you or your organization?
  - i. *[If yes]* How much information on the tax transcripts is not necessary for you to do your job?
- f. How do you feel about how the information is presented on the tax transcripts?
- g. If you could improve the format of the transcript to do your job better, how would you alter it?

### 4. Transcript Delivery

- a. How long does it typically take for transcripts to arrive?
  - i. Do you feel like this is an appropriate amount of time to receive a tax transcript?
  - ii. *[If no]* How long should it take for tax transcripts to arrive?
- b. How do you receive the transcripts you request?
  - i. *[Probe]* If you receive your transcripts by mail, is there another method of delivery that you would prefer instead?

## 5. Overall Experience

- a. Overall, how would you evaluate your experience with the tax transcript process?
  - i. *[Probe]* What could have made the process easier?

### Closing question *3 Minutes*

1. Were there any other aspects about your experience with the tax transcript process that we have not discussed?

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. The time estimated for your participation is 60 minutes. If you have any comments regarding the time estimates associated with this study or suggestions on making this process simpler, please write to the Internal Revenue Service, Special Services Section, SE:W:CAR:MP:T:M:SP, Room 6129, 1111 Constitution Ave., NW, Washington, DC 20224.

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