

Nationwide Tax Forums 2017 – Focus Groups

Screener Guide for “Collection Offer in Compromise Pre-Qualifier Tool”

Hello, my name is _____ and I am an employee of the Internal Revenue Service. I am recruiting approximately 20 tax practitioners to participate in one of the focus group discussions that will be held during this tax forum. The IRS has asked me to gather ideas, opinions and experiences of practitioners who have used the Offer in Compromise Pre-Qualifier tool.

First, may I ask you a qualifying question?

Question: Have you used the Offer in Compromise Pre-Qualifier tool within the last year?

If the answer is yes, then invite the practitioner to participate in the focus group.

If the answer is no, thank the practitioner for stopping to talk with you.

We would like to invite you to participate in the focus group titled ‘OIC Pre-Qualifier Tool’ with about nine other tax practitioners. Again, we want to hear your opinions, views and ideas. The session should take approximately 1 hour and will be held on __ (day) __ at __ (time) __ in Room _____.

The Paperwork Reduction Act requires that the IRS display an OMB control number on all public information requests. The OMB Control Number for this focus group is 1545-1349. We estimate the time required to be one hour. Also, if you have any comments regarding the time estimates associated with this study or suggestions on making this process simpler, please write to:

Internal Revenue Service
Special Services Committee
SE:W:CAR:MP:T:M:S
Room 6129
1111 Constitution Ave. NW
Washington, DC 20224

**Guide for
Offer in Compromise Pre-Qualifier Tool
Focus Group**

Hello! My name is _____ and I'm a focus group moderator from the Internal Revenue Service. My co-moderator _____ will be taking notes to capture our conversation.

During our session today, we will be discussing the Offer in Compromise Pre-Qualifier tool on IRS.gov. The Offer in Compromise Pre-Qualifier tool reduces taxpayer burden by helping taxpayers determine if they meet the requirements for an offer in compromise before they complete and submit any paperwork or offer payments.

The purpose of our session is to gather input from you about your experiences with the Offer in Compromise Pre-Qualifier tool. We'd like to hear what works well and any opportunities for improvement. Through our discussion today, we would like to gather your opinions, experiences, and suggestions. Please feel free to point out anything that is important to you, both good and bad. The information we gather at this and other focus groups will be used to improve the Offer in Compromise Pre-Qualifier tool.

For those who have not participated in a focus group before, let me explain what it is. A focus group is a research tool used to gather ideas and opinions from a group of individuals with a common characteristic or experience by means of directed discussion. The common experience for this group is use of the Offer in Compromise Pre-Qualifier tool. My job as a moderator is to help guide the flow of conversation, make sure everyone's comments are heard, and ensure questions about various aspects of the topics are covered. I will be referring to an outline during our session. I may periodically break off the conversation and move to a new topic to make sure we capture all the important points from our outline.

In order for our discussion to move along smoothly, I would like to go over some ground rules:

- There is no right **or wrong answers**, but there could be different points of view. Everyone's opinion is valuable. Say what you believe, whether or not anyone else agrees with you. The most important thing about a focus group is the exchange of ideas and opinions.
- Please speak one-at-a-time, loudly, and clearly.
- Please give us your full attention. This focus group is scheduled to last one hour.
- Please silence any cell phones.
- This is one of several focus groups that will be held on this topic. The findings from the focus groups will be aggregated and summarized. No individual information is identified.
- As a standard practice, a Privacy Impact Assessment has been completed for this project for the protection of your privacy. We will not collect Personally Identifiable Information during this session. Any feedback gathered may be aggregated into a report. You will not be identified.

- Do you have any questions before we begin?

We are required to report to you the OMB control number for this public information request. That number is 1545-1349.

Warm Up

We only need to know your FIRST name before you speak so we can make sure everyone is equally engaged in the discussion. Please also remember to adhere to privacy, disclosure and security practices during this session. We ask every participant to maintain privacy to the extent allowed by law for each other.

Let's begin! Please tell us your first name, how long you have been in practice and how many times you have used the Offer in Compromise Pre-Qualifier tool in the last year.

Tool Use

1. Tell the group about your experiences using the Offer in Compromise Pre-Qualifier tool.
2. In what ways did you find the tool easy to use?
3. In what ways did you find the tool difficult to use?
Required Probe:
 - o Did you need any help using the tool?
 - o Whom did you go to for help?

Tool Effectiveness

4. How many of you have had an offer accepted after using the tool? [Get a count]
5. How many of you had an Offer in Compromise rejected after using the tool? [Get a count]
6. What were the reasons those offers were rejected after using the tool?
[Moderator will put reasons on the flip chart]
7. What information do you think the tool should have requested that would have prevented you from submitting an Offer in Compromise that was rejected?

8. What information did the tool request that you thought was unnecessary?

Change Recommendations

9. What changes would you make to the Offer in Compromise Pre-Qualifier tool?
Why?

Communication

10. How did you learn about the Offer in Compromise Pre-Qualifier tool?

11. How can the IRS do a better job making practitioners aware of the Offer in Compromise Pre-Qualifier tool and the benefits of using it?

Wrap-Up

12. Are there any other comments about the topics we covered today?

Thank you for sharing your thoughts and opinions with us today. Your participation and feedback is extremely valuable. Your comments will help SB/SE Collection improve the Offer in Compromise Pre-Qualifier tool. Enjoy the rest of your day.
