

Moderators Guide: National Tax Forum 2017

1:1 Interviews

[Location]

Interview duration: 50 min

Setup Needed: Laptop, internet connection, timer

IRS.gov

Frame up for session -2 min

- Welcome and purpose
 - Thank you so much for coming in today. I wanted to give you a little information about what you will be looking at and give you time to ask any questions you might have before we get started.

- Set expectations for interview
 - For the IRS to speak with the public, we are required to have approval from the Office of Management and Budget. Their approval number for this project is 1545-1349. Also, if you have any comments regarding the time estimates associated with this study or suggestions on making this process simpler, please write to the: IRS Special Services Section, 1111 Constitution Avenue, NW, SE:W:CAR:MP:T:M:S - Room 6129, Washington, DC 20224. [Moderator: Post this bullet on newsprint/white board for each session. There are no known risks to you for taking part in this focus group session. All the data the IRS collects will be kept private to the extent allowed by law. Your name will never be linked to your comments, nor will it appear in any written reports or publications.

 - “We have redesigned IRS.gov. Today we are asking you to serve as an evaluator of a Web site and to complete a set of tasks. Our goal is to see how easy or difficult you find the site to use. “

- o We have some introductory questions and a few after the tasks are completed. This session should take about 50 min.
- Do you have any questions before we get started?

Introductory Questions -2 min

What type of tax professional are you?

- CPA
- Enrolled Agent
- Reporting Agent
- Return Preparer
- Attorney
- Software Developer
- Other: _____

What is your area of Specialization:

- Estate
- Retirement & Financial Planning
- Forensics & Bankruptcy Accounting
- Not-for-Profit
- Personal Finance
- Valuations
- Audit
- Taxation
- Management Accounting
- Other: _____

Who are your primary clients? Any special groups? *i.e. Military, foreign nationals, small business, farmers, low income, etc.*

Frame up for tasks activity -1 min

- We are going to move on and ask you to try to complete 5 tasks on the new site. I am here to record your reactions and comments of the Web site you will view.
- During this session, I would like you to think aloud as you work to complete the tasks. I will not be able to offer any suggestions or hints, but from time to time, I may ask you to clarify what you have said or ask you for information on what you were looking for or what you expect to have happen.
- There is no right or wrong answer. If you have any questions, comments or areas of confusion while you are working, please let me know. If you ever feel that you are lost or cannot complete a task with the information that you have been given, please let me know.

Do you have any questions before we begin?

Setup

- o Verify internet connection and that the test site is working.
- o Participant should be seated at a laptop with the test site.
- o Start the timer as each task is attempted. End after task completed or allow a maximum of 5 min per task.
- o Record participant comments and redirect as necessary.

Tasks -25 min 9

Task 1

- o Locate information on a Lost or Misplaced EIN.

Task 2

- o Find information on reporting phishing or online scams.

Task 3

- o Locate the 2015 version of Publication 15.

Task 4

- o Find information about understanding Notice CP75.

Task 5

- o Find information on applying for tax exempt status.

Tasks activity wrap up - 2 min

- o How easy or difficult was it to navigate the site?
- o Was there anything you particularly liked or disliked?

Future State Questions -7 min

Closing -1 min

- Thank participant for their time.
- Ask participant if they are willing to participate in future research studies to provide their contact info/business card.

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1:1 Interviews

[Location]

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Setup Needed: Laptop, internet connection, timer

Tax Professional Online Account

Frame up for session -2 min

- Welcome and purpose
 - Thank you so much for coming in today. I wanted to give you a little information about what you will be looking at and give you time to ask any questions you might have before we get started.

- Set expectations for interview
 - For the IRS to speak with the public, we are required to have approval from the Office of Management and Budget. Their approval number for this project is 1545-1349. Also, if you have any comments regarding the time estimates associated with this study or suggestions on making this process simpler, please write to the: IRS Special Services Section, 1111 Constitution Avenue, NW, SE:W:CAR:MP:T:M:S - Room 6129, Washington, DC 20224. [Moderator: Post this bullet on newsprint/white board for each session. There are no known risks to you for taking part in this focus group session. All the data the IRS collects will be kept private to the extent allowed by law. Your name will never be linked to your comments, nor will it appear in any written reports or publications.

 - “We have designed a prototype for a new service called Tax Professional Online Account. Today we are asking you to serve as an evaluator of this electronic service and to complete a set of tasks. Our goal is to see how easy or difficult you find the site to use. “

 - o We have some introductory questions and a few after the tasks are completed. This

session should take about 50 min.

- Do you have any questions before we get started?

Introductory Questions -2 min

What type of tax professional are you?

- CPA
- Enrolled Agent
- Reporting Agent
- Return Preparer
- Attorney
- Software Developer
- Other: _____

What is your area of Specialization:

- Estate
- Retirement & Financial Planning
- Forensics & Bankruptcy Accounting
- Not-for-Profit
- Personal Finance
- Valuations
- Audit
- Taxation
- Management Accounting
- Other: _____

Who are your primary clients? Any special groups? *i.e. Military, foreign nationals, small business, farmers, low income, etc.*

Frame up for tasks activity -1 min

- We are going to move on and ask you to try to complete 5 tasks on Online Account. I am here to record your reactions and comments of the prototype you will view.
- During this session, I would like you to think aloud as you work to complete the tasks. I will not be able to offer any suggestions or hints, but from time to time, I may ask you to clarify what you have said or ask you for information on what you were looking for or what you expect to have happen.
- There is no right or wrong answer. If you have any questions, comments or areas of confusion while you are working, please let me know. If you ever feel that you are lost or cannot complete a task with the information that you have been given, please let me know.

Do you have any questions before we begin?

Setup

- Verify internet connection and that the test site is working.
- Participant should be seated at a laptop with the prototype.
- Start the timer as each task is attempted. End after task completed or allow a maximum of 5 min per task.
- Record participant comments and redirect as necessary.

Tasks -25 min 9

Task 1

- Locate information on a Lost or Misplaced EIN.

Task 2

- Find information on reporting phishing or online scams.

Task 3

- o Locate the 2015 version of Publication 15.

Task 4

- o Find information about understanding Notice CP75.

Task 5

- o Find information on applying for tax exempt status.

Tasks activity wrap up - 2 min

- o How easy or difficult was it to navigate this Online Account?
- o Was there anything you particularly liked or disliked?

Future State Questions -7 min

Closing -1 min

- Thank participant for their time.
- Ask participant if they are willing to participate in future research studies to provide their contact info/business card.

Recruitment Script

2017 IRS Nationwide Tax Forum Interviews

Recruitment Script

Hello, my name is _____. I work for the Internal Revenue Service and I'm recruiting tax professionals to participate in one-on-one interviews. May I speak with you for a couple minutes?

The purpose of the session is to gather information from tax professionals about our redesigned website and new online service.

The interview is scheduled for 50 minutes, and your input will inform the design of online services for tax professionals.

Your participation in the interview is completely voluntary.

Are you interested in participating?

If the tax professional agrees to participate: show them available timeslots, schedule them for a timeslot and provide a reminder sheet containing the interview date, time and location.

If the tax professional does not agree to participate: thank them for their time.

Interview Reminder

2017 IRS Nationwide Tax Forum Interview Reminder

Thank you for agreeing to participant in this Tax Professional Partnerships interview. For your convenience, we have listed the date, time and location of the session below.

Interview date: <date>

Interview time: <time>

Interview location: <location>