

Screener Guide for Tax Practitioner Focus Group

Script to Solicit Participants for 2017 Tax Practitioner Focus Groups

Hello, my name is _____. May I speak with you for a couple minutes?

I work for the Internal Revenue Service and I'm recruiting tax professionals to participate in a focus group of tax practitioners who serve limited English proficient (LEP) taxpayers.

Your participation in the interview is completely voluntary.

The purpose of the session is to gather information from tax professionals who serve. Discussion will be held about LEP taxpayers' and tax professionals' awareness and use of tax information, products and services. The interview is scheduled for 120 minutes, and your feedback from the focus groups will be used to improve IRS's tax products and services to assist taxpayers in meeting their tax obligations.

Do you prepare tax returns for taxpayers who speak a language other than English?

If YES, continue.

If NO, thank them and let them go. If they ask, remind them we are only looking for tax professionals who service taxpayers who speak foreign languages because the products/materials we are testing are for limited English proficient taxpayers.

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.

1. Do you prepare tax returns for taxpayers who speak a language other than English?

Yes

No..... Thank them and let them go. If they ask, tell them we are only looking for preparers who service taxpayers who speak foreign languages because the products we are testing are for limited English proficient taxpayers.

2. **If yes, what language do you primarily serve? Try to get a variety.**

3. **Which of the following best describes the type of returns you prepare most?**

- **Try to get a mix of both**

[] Individual.....Yes
[] Business.....Yes

4. **Are you aware that the IRS offers products and services in languages other than English?**

- **Try to get a mix of both**

[] Yes
[] No

When invitation to participate is extended, please restate that they will be participating with other tax professionals.

Recruiters: Please use this box to tally the attempts to recruit practitioners. At the completion of the project, we must report to OMB the number of requests or attempts to recruit practitioners for the focus group. After recruiting is completed, give the tally to the moderator of your focus group. The moderator will total the recruit attempts at this forum.

TALLY ATTEMPTS TO RECRUIT PRACTITIONERS FOR SURVEY

IRS Media & Publication Limited English Proficient Tax Preparer Moderator's Guide

I. Welcome and Introductions:

A. Introduction of the moderator.

My name is _____ and I will be your moderator for this session. I work for the IRS. I will be asking for your input about your experience with helping your limited English proficient clients and any tax products or services you use to assist them. The Media and Publications Division of IRS is responsible for tax products, services and web pages in languages other than English. We would like your feedback on the products IRS provides and ways to improve our services.

B. What is a moderator?

My job as a moderator is to:

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

You will see me referring to this outline during our session. The outline includes all issues I need to raise, and helps me keep the discussion on track. It is important that we cover all the issues. Therefore, I may have to break off the conversation in order to move on to another area in the guide.

C. Ground Rules

Before we begin, I'd like to review some ground rules for today's discussion.

- No evaluation -- there are no right and wrong answers.
- Your participation is voluntary.
- What we talk about here will remain anonymous. That means your name will not be associated with anything you say in our reports and your responses will not be linked to your identity in any way. Likewise, we will not share any of our discussion from today with others who are not actively working on this project.
- If you have a cell phone, please turn it off or set to vibrate.
- This session will last about two hours.

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.

All participants will need to sign an informed consent for their participation in the session.

Review consent form, emphasizing confidentiality, and use of first names only.

D. Introduction of Participants:

Please tell us:

- a. In what state and city do you work?
- b. How long have you prepared tax returns?
- c. Do you primarily serve individual taxpayers or business taxpayers? What percent of your clientele are individual taxpayers and business taxpayers?
- d. Approximately how many times in the past 12 months have you gone to www.irs.gov

E. General Awareness

What are the primary languages, other than English, that your clients speak?

On a scale of 1 to 10, with 1 being very low and 10 being very high, how technically savvy would you consider yourself?

Moderator, take a count.

On a scale of 1 to 10, with 1 being very low and 10 being very high, how technically savvy would you consider the clients you represent?

Moderator, take a count.

Are you aware that there are webpages on IRS.gov that are in different languages?

Probe: If so, have you used these web pages?

Moderator, take a count of those that have used the web pages.

F. Current Products and Services

What is the primary web page language that you used?

If you have not used the web page, what are some of the reasons you have not used them?

What are some of reasons why you use the web pages?

When using the web pages did you search by topic or form?

How did using the web pages help you?

Do you ever direct your clients to use the webpage?

Do you ever receive feedback on the web pages from you clients?

Probe: If so, what type of feedback did you receive?

What do you or they like about the web pages?

How can we improve the web pages?

Is there additional information you would like to see on these web pages?

Next, I am going to ask you how often you use some of the applications we provide in other languages. Please let me know if you never used them, rarely use them, sometimes use them, often use them, almost always use them or it's not applicable.

Applications	Never	Rarely	Sometimes	Often	Almost Always	NA
Preparing a Return						
Offer-in-Compromise Pre-qualifier						
Appeals Mediation Program						
Understanding a Federal Tax Lien						
Levies						
On-line Payment Agreement						
Credits on a Return						
IRS Collection						
IRS Notices						
ITIN						
Refunds						
Identity Theft						
Understanding Tax Laws						
Understanding Filing Obligations						

Are there additional applications you would like to see in other languages?

Probe: If so, which ones and what languages

Please let me know if you have heard of the Over-the-Phone Interpreter (OPI) service that the IRS provides?

If yes, have any of your clients who speak little or no English used OPI service while transacting business with IRS?

Note: Moderator will record scores of those that have used OPI services using the chart below.

Service	Very Dissatisfied	Dissatisfied	Neutral	Satisfied	Very Satisfied
Time to connect to interpreter					
Clear understanding of interpretation					

The IRS has also produced several tax products for the LEP taxpayer. We want to know if you are aware of these products, if you use them and your satisfaction with these products.

Note: Moderator will use a flip chart to record those who are aware of the products, those who use them and satisfaction of these products. Satisfaction is rated as follows:

1 Very Dissatisfied

2 Dissatisfied

3 Neutral

4 Satisfied

5 Very Satisfied

A list of 10 products will be given to the tax practitioner to access.

How did you become aware that the products and services existed?

Probe: Are there better ways to inform you and your clients of services and products in other languages?

Is this sufficient or do we need to include additional products?

Probe: What additional products should the IRS include?

What issues do you see most frequently?

What questions do you most frequently answer for your clients?

What credits do you most commonly claim for your clients?

What do you clients misunderstand the most?

What type of impact did eliminating ITINS have on your clients?

Did your clients experience any problems with delayed EITC refunds?

Probe: If so, what issues did this create?

What do you think the IRS could do to advertise or promote products and services to LEP communities?

What else could the IRS do to improve our products and services to LEP taxpayers?

Thank you for your time. We appreciate your feedback and look forward to making our tax products and services more helpful to the LEP taxpayer and tax practitioners.

Participant Consent Form

The purpose of this study is to discuss your experience with helping your limited English proficient (LEP) clients and the tax products and services you use to assist them. By participating in this focus group, you will help us evaluate if the products and services IRS offers is meeting your LEP clients' needs.

This focus group will take approximately 2 hours.

Your participation is completely voluntary. You do not have to answer any questions you do not want to. Your answers will be kept confidential and used for the purpose of this study only.

If you agree to help us, please sign below.

(Signature)

(Date)

(Print Name)