**Screener Guide for Language Services Needs Assessment Survey**

Hello, my name is \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_. I work for the IRS and am recruiting tax professionals to participate in a survey. May I please speak to you for a few minutes?

The Internal Revenue Service (IRS) is interested in gathering information to improve IRS services to limited English proficient (LEP) taxpayers. We are conducting a survey to gather information on the tax products and services we provide to LEP taxpayers.

If you are interested in taking the survey, I need to ask you a qualifying question.

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 reviewing are for limited English proficient taxpayers and tax practitioners.

**If yes, invite them to take the survey. The survey should take about 5 minutes.**

 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.

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| TALLY ATTEMPTS TO RECRUIT PRACTITIONERS FOR SURVEY |

**Language Services Needs Assessment 2017 Tax Forum Survey**

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| You can help the IRS improve service to you and other tax practitioners by answering the questions below. This anonymous and voluntary survey takes about 5 minutes to complete. Please mark the box to your answer. |

1. What type of tax professional are you? Please select all that apply.

🞏 Certified Public Accountant

🞏 Tax Attorney

🞏 National Tax Preparation Firm Employee (e.g., H&R Block, Jackson Hewitt)

🞏 Enrolled Agent

🞏 Circular 230 Practitioner (other than Enrolled Agent)

* Accountant/Bookkeeper
* Other, please specify: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
1. Where is your office located?

City \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ State\_\_\_\_\_\_\_\_\_\_\_\_\_ ZIP Code\_\_\_\_\_\_\_\_\_\_

1. Besides English, what languages do you use to speak with clients? Please select all that apply.

 🞏 No other languages besides English 🞏 Spanish

 🞏 Chinese 🞏 Vietnamese

 🞏 Korean 🞏 Russian

 🞏 Creole 🞏 German

 🞏 Arabic 🞏 French

 🞏 Tagalog 🞏 Portuguese

 🞏 Somali 🞏 Japanese

 🞏 Burmese 🞏 Amharic

🞏 Other, please specify: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

1. Which language would you prefer to utilize in order to speak with the IRS?

 🞏 No other languages besides English 🞏 Spanish

 🞏 Chinese 🞏 Vietnamese

 🞏 Korean 🞏 Russian

 🞏 Creole 🞏 German

 🞏 Arabic 🞏 French

 🞏 Tagalog 🞏 Portuguese

 🞏 Somali 🞏 Japanese

 🞏 Burmese 🞏 Amharic

 🞏 Other, please specify: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

1. Which language would you prefer to utilize for written communication with the IRS (e.g., forms, publications, and notices)?

 🞏 No other languages besides English 🞏 Spanish

 🞏 Chinese 🞏 Vietnamese

 🞏 Korean 🞏 Russian

 🞏 Creole 🞏 German

 🞏 Arabic 🞏 French

 🞏 Tagalog 🞏 Portuguese

 🞏 Somali 🞏 Japanese

 🞏 Burmese 🞏 Amharic

🞏 Other, please specify: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

1. Did you prepare tax returns for clients during the 2017 tax season that primarily speak the following languages? If so, how many returns did you prepare?

 Yes No How many returns?

 ▼ ▼

English 🞏 🞏 Number of returns

Chinese 🞏 🞏 Number of returns

Korean 🞏 🞏 Number of returns

Russian 🞏 🞏 Number of returns

Spanish 🞏 🞏 Number of returns

Vietnamese 🞏 🞏 Number of returns

German 🞏 🞏 Number of returns

Creole 🞏 🞏 Number of returns

Arabic 🞏 🞏 Number of returns

French 🞏 🞏 Number of returns

Tagalog 🞏 🞏 Number of returns

Portuguese 🞏 🞏 Number of returns

Somali 🞏 🞏 Number of returns

Japanese 🞏 🞏 Number of returns

Burmese 🞏 🞏 Number of returns

Amharic 🞏 🞏 Number of returns

Other, please specify:\_\_\_\_\_\_\_ 🞏 🞏 Number of returns

1. Individuals who do not speak, write, or understand English are considered limited-English proficient (LEP). Please indicate how often do you encounter each of the following during the 2017 tax season while assisting your LEP clients?

 Never Rarely Sometimes Often Almost Always Not Applicable

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Preparing a Return 🞏 🞏 🞏 🞏 🞏 🞏

Credits on Tax Returns 🞏 🞏 🞏 🞏 🞏 🞏

Affordable Care Act

ITIN Assistance 🞏 🞏 🞏 🞏 🞏 🞏

IRS Collections 🞏 🞏 🞏 🞏 🞏 🞏 IRS Notices 🞏 🞏 🞏 🞏 🞏 🞏

Refunds 🞏 🞏 🞏 🞏 🞏 🞏 Identity Theft 🞏 🞏 🞏 🞏 🞏 🞏

Understanding Tax Laws 🞏 🞏 🞏 🞏 🞏 🞏 Understanding Filing 🞏 🞏 🞏 🞏 🞏 🞏

 Obligations

1. What percentage of your 2017 tax season LEP clients are small business owners?

🞏 None 🞏 11-25% 🞏 51-75%

🞏 1-10% 🞏 26-50% 🞏 Over 75%

1. For each IRS resource below, please answer the following:

 I am aware it exists Have you used it? If you used it, how satisfied were you?

 Very Very

 Dissatisfied Dissatisfied Neutral Satisfied Satisfied

 Yes No Yes No 1 2 3 4 5

**IRS RESOURCES IN** ▼ ▼ ▼ ▼ ▼ ▼ ▼ ▼ ▼

**OTHER LANGUAGES**

Publication 850—Glossary 🞏 🞏 🞏 🞏 🞏 🞏 🞏 🞏 🞏

 of Technical Tax Terms

“Opening the Door” 🞏 🞏 🞏 🞏 🞏 🞏 🞏 🞏 🞏

 brochure series

 “IRS is Speaking 🞏 🞏 🞏 🞏 🞏 🞏 🞏 🞏 🞏

 Your Language” brochure

Phone Interpreter 🞏 🞏 🞏 🞏 🞏 🞏 🞏 🞏 🞏

IRS.gov 🞏 🞏 🞏 🞏 🞏 🞏 🞏 🞏 🞏

­­­­­­­­­­­­­­­­­­­Where’s my Refund 🞏 🞏 🞏 🞏 🞏 🞏 🞏 🞏 🞏

IRS2GO 🞏 🞏 🞏 🞏 🞏 🞏 🞏 🞏 🞏

Direct Pay 🞏 🞏 🞏 🞏 🞏 🞏 🞏 🞏 🞏

Forms 🞏 🞏 🞏 🞏 🞏 🞏 🞏 🞏 🞏

Publications 🞏 🞏 🞏 🞏 🞏 🞏 🞏 🞏 🞏

Offer In-Compromise 🞏 🞏 🞏 🞏 🞏 🞏 🞏 🞏 🞏

Pre-Qualifier

Appeals Mediation programs 🞏 🞏 🞏 🞏 🞏 🞏 🞏 🞏 🞏

Understanding a Federal 🞏 🞏 🞏 🞏 🞏 🞏 🞏 🞏 🞏

Tax Lien 🞏 🞏 🞏 🞏 🞏 🞏 🞏 🞏 🞏

Levies 🞏 🞏 🞏 🞏 🞏 🞏 🞏 🞏 🞏

Online Payment Agreement 🞏 🞏 🞏 🞏 🞏 🞏 🞏 🞏 🞏

1. What would be the single ***most valuable*** additional service the IRS could provide so you are able to better serve limited-English proficient clients?

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*Paperwork Reduction Act Notice*

*The Paperwork Reduction Act requires that the IRS provide an OMB control number relating to all public information requests along with the address where you can send comments regarding the survey.  The OMB number for this survey is 1545-1432.  If you have any comments regarding this survey, please write to:  IRS, Special Services Section, SE:W:CAR:MP:T:M:S, Room 6129, 1111 Constitution Avenue, NW, Washington, DC 20224.*

*Privacy Statement*

*The authority requesting the information is 5 USC 301.  The primary purpose of asking for the information is to determine steps the IRS can take to improve our services to you.  The information may be disclosed as authorized by the routine uses published for the Privacy Act System of Records entitled, Treas/IRS 00.001 Correspondence Files, including Stakeholder Partnership File, and Correspondence Control Files, as published in the Federal Register:  December 10, 2001 (Volume 66, Number 237) [Notices] pages 63785-6.  Providing the information is voluntary.  Not answering some or all of the questions will not affect you.*