

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.

TALLY ATTEMPTS TO RECRUIT PRACTITIONERS FOR SURVEY

Language Services Needs Assessment 2017 Tax Forum Survey

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: _____

2. Where is your office located?

City _____ State _____ ZIP Code _____

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

<input type="checkbox"/> No other languages besides English	<input type="checkbox"/> Spanish
<input type="checkbox"/> Chinese	<input type="checkbox"/> Vietnamese
<input type="checkbox"/> Korean	<input type="checkbox"/> Russian
<input type="checkbox"/> Creole	<input type="checkbox"/> German
<input type="checkbox"/> Arabic	<input type="checkbox"/> French
<input type="checkbox"/> Tagalog	<input type="checkbox"/> Portuguese
<input type="checkbox"/> Somali	<input type="checkbox"/> Japanese
<input type="checkbox"/> Burmese	<input type="checkbox"/> Amharic
<input type="checkbox"/> Other, please specify: _____	

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

<input type="checkbox"/> No other languages besides English	<input type="checkbox"/> Spanish
<input type="checkbox"/> Chinese	<input type="checkbox"/> Vietnamese
<input type="checkbox"/> Korean	<input type="checkbox"/> Russian
<input type="checkbox"/> Creole	<input type="checkbox"/> German
<input type="checkbox"/> Arabic	<input type="checkbox"/> French
<input type="checkbox"/> Tagalog	<input type="checkbox"/> Portuguese
<input type="checkbox"/> Somali	<input type="checkbox"/> Japanese
<input type="checkbox"/> Burmese	<input type="checkbox"/> Amharic
<input type="checkbox"/> Other, please specify: _____	

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

<input type="checkbox"/> No other languages besides English	<input type="checkbox"/> Spanish
<input type="checkbox"/> Chinese	<input type="checkbox"/> Vietnamese
<input type="checkbox"/> Korean	<input type="checkbox"/> Russian
<input type="checkbox"/> Creole	<input type="checkbox"/> German
<input type="checkbox"/> Arabic	<input type="checkbox"/> French

- Tagalog
- Somali
- Burmese
- Other, please specify: _____
- Portuguese
- Japanese
- Amharic

6. 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 <input type="checkbox"/>	No <input type="checkbox"/>	How many returns?
English	<input type="checkbox"/>	<input type="checkbox"/>	Number of returns
Chinese	<input type="checkbox"/>	<input type="checkbox"/>	Number of returns
Korean	<input type="checkbox"/>	<input type="checkbox"/>	Number of returns
Russian	<input type="checkbox"/>	<input type="checkbox"/>	Number of returns
Spanish	<input type="checkbox"/>	<input type="checkbox"/>	Number of returns
Vietnamese	<input type="checkbox"/>	<input type="checkbox"/>	Number of returns
German	<input type="checkbox"/>	<input type="checkbox"/>	Number of returns
Creole	<input type="checkbox"/>	<input type="checkbox"/>	Number of returns
Arabic	<input type="checkbox"/>	<input type="checkbox"/>	Number of returns
French	<input type="checkbox"/>	<input type="checkbox"/>	Number of returns
Tagalog	<input type="checkbox"/>	<input type="checkbox"/>	Number of returns
Portuguese	<input type="checkbox"/>	<input type="checkbox"/>	Number of returns
Somali	<input type="checkbox"/>	<input type="checkbox"/>	Number of returns
Japanese	<input type="checkbox"/>	<input type="checkbox"/>	Number of returns
Burmese	<input type="checkbox"/>	<input type="checkbox"/>	Number of returns
Amharic	<input type="checkbox"/>	<input type="checkbox"/>	Number of returns
Other, please specify: _____	<input type="checkbox"/>	<input type="checkbox"/>	Number of returns

7. 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 <input type="checkbox"/>	Rarely <input type="checkbox"/>	Sometimes <input type="checkbox"/>	Often <input type="checkbox"/>	Almost Always <input type="checkbox"/>	Not <input type="checkbox"/>
Applicable	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Preparing a Return	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Credits on Tax Returns	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Affordable Care Act						
ITIN Assistance	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
IRS Collections	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
IRS Notices	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Refunds	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Identity Theft	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Understanding Tax Laws	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Understanding Filing	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Obligations						

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

- None 11-25% 51-75%
 1-10% 26-50% Over 75%

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

IRS RESOURCES IN OTHER LANGUAGES	I am aware it exists		Have you used it?		If you used it, how satisfied were you?				
	Yes	No	Yes	No	Very Dissatisfied	Dissatisfied	Neutral	Satisfied	Very Satisfied
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	1	2	3	4	5
Publication 850—Glossary of Technical Tax Terms	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
“Opening the Door” brochure series	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
“IRS is Speaking Your Language” brochure	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Phone Interpreter	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
IRS.gov	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Where’s my Refund	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
IRS2GO	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Direct Pay	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Forms	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Publications	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Offer In-Compromise	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Pre-Qualifier	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Appeals Mediation programs	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Understanding a Federal Tax Lien	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Levies	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Online Payment Agreement	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

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

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.