

Moderator's Guide: Nationwide Tax Forum 2019

1:1 Interviews

Tax Forum Locations

Interview duration: 30 min

Setup Needed: Laptop, internet connection, timer

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- Note to researcher: This product has a low adoption rate and is underutilized, and the internal product team has a theory as to why this is true. We are using this research to support/refute this idea and don't want to influence your interpretation by sharing this theory.

Frame Up Session - 5 mins

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. The purpose of today's session is to talk to you about a secure messaging portal for Power of Attorneys. We are independent researchers and did not create this product, so please be as candid as possible when providing feedback. But before we start, let's go over some ground rules.

- Privacy Everything that you say here will be kept strictly private. We will use first names only and names will not be used in any report so please feel free to tell me what you think.
- Voluntary Participation Your participation today is entirely voluntary. You do not have to answer any questions that you do not wish to answer but please keep in mind, there are no wrong answers.
- Time I will be watching our time and directing our conversation. We will be here for about 30 minutes. A formal break has not been scheduled but if you need to stretch, go to the restroom, or walk around a little, feel free to do so but please come back quickly. Your comments and participation are very important to us.
- Recording I'll be taking notes throughout our session, but I'll also be recording to ensure we capture all of your feedback. The recording will include audio only.
- Thanks Thank you again for participating in today's session. We appreciate your time and your feedback today.

Do you have any questions before we get started?

Demographic Questions – 3 mins

What type of tax professional are you?

- CPA
- Enrolled Agent
- Reporting Agent

- Return Preparer
- Attorney
- Software Developer
- Other: _____

How many years have you been working in this field?

- Less than 1
- 1 – 10
- 11 – 20
- More than 20

Overview: Power of Attorney Secure Messaging - 20 mins

Now I'd like to walk you through a product where you will be acting as an Authorized Representative of your client, requesting guided help. (**To researcher:** Allow the participant to click through the slides.) Please follow along and share any opinions you have out loud as you walk through the experience. (**To researcher:** as the user walks through the click-through, encourage them by gently asking "does this make sense to you?" or "do you have any questions?" if they are not talking through their decisions to click forward aloud. Sometimes users are uncomfortable with this practice and need a bit of encouragement.)

Welcome, Charlie Canvasback | Logout

Guide Me
Please answer the questions below so we can route you to the right place.

Are you registering on Secure Messaging for yourself or as an authorized representative for another taxpayer?

Myself

I am representing another taxpayer

Next


Answered Questions

What is your authentication type?
eauth

Are you logging in to review a new tax issue, or to review previous messages?
New tax issue

Guide Me

Please answer the questions below so we can route you to the right place.

 Is your client being audited?


Yes

No


[Next](#)

Answered Questions

 **What is your authentication type?**
eauth

 **Are you logging in to review a new tax issue, or to review previous messages?**

New tax issue

 **Are you registering on Secure Messaging for yourself or as an authorized representative for another taxpayer?**

I am representing another taxpayer

Guide Me

Please answer the questions below so we can route you to the right place.

- Is the audit being conducted by mail or were you invited to an in-person interview?**
- Mail
 - In-person

[Next](#)

Answered Questions

- What is your authentication type?**
eauth
- Are you logging in to review a new tax issue, or to review previous messages?**
New tax issue
- Are you registering on Secure Messaging for yourself or as an authorized representative for another taxpayer?**
I am representing another taxpayer
- Is your client being audited?**
Yes

Guide Me

Please answer the questions below so we can route you to the right place.

? Is your client already signed up for Secure Messaging?

Yes

No

Next

Answered Questions

What is your authentication type?

eauth

Are you logging in to review a new tax issue, or to review previous messages?

New tax issue

Are you registering on Secure Messaging for yourself or as an authorized representative for another taxpayer?

I am representing another taxpayer

Is your client being audited?

Yes

Guide Me

Please answer the questions below so we can route you to the right place.

? Did you previously receive a Letter 566 or 525 in the mail? Please look in the lower right-hand corner of the letter for the letter number.

Yes

No

Next

Answered Questions

What is your authentication type?

eauth

Are you logging in to review a new tax issue, or to review previous messages?

New tax issue

Are you registering on Secure Messaging for yourself or as an authorized representative for another taxpayer?

I am representing another taxpayer

Is your client being audited?

Yes

Guide Me

Please answer the questions below so we can route you to the right place.

? Have you already submitted Form 2848, "Power of Attorney and Declaration of Representative" and Form 8821, "Tax Information Authorization" or have another authorization on file?

- Yes
- No

Next

Answered Questions

- What is your authentication type?**
eauth
- Are you logging in to review a new tax issue, or to review previous messages?**
New tax issue
- Are you registering on Secure Messaging for yourself or as an authorized representative for another taxpayer?**
I am representing another taxpayer
- Is your client being audited?**
Yes

Guide Me

Please answer the questions below so we can route you to the right place.

? Which IRS office did the letter come from? Please look at the top of the letter to determine the location.

- Philadelphia PA 19255-0049
- P.O. Box 9002 Holtsville NY 11742
- Other

Next

Answered Questions

- What is your authentication type?**
eauth
- Are you logging in to review a new tax issue, or to review previous messages?**
New tax issue
- Are you registering on Secure Messaging for yourself or as an authorized representative for another taxpayer?**
I am representing another taxpayer
- Is your client being audited?**
Yes

Guide Me

Please answer the questions below so we can route you to the right place.

First Name of the Taxpayer

Next

Answered Questions

- What is your authentication type?**
eauth
- Are you logging in to review a new tax issue, or to review previous messages?**
New tax issue
- Are you registering on Secure Messaging for yourself or as an authorized representative for another taxpayer?**
I am representing another taxpayer
- Is your client being audited?**
Yes

Guide Me

Please answer the questions below so we can route you to the right place.

Last Name of the Taxpayer

Next

Answered Questions

- What is your authentication type?**
eauth
- Are you logging in to review a new tax issue, or to review previous messages?**
New tax issue
- Are you registering on Secure Messaging for yourself or as an authorized representative for another taxpayer?**
I am representing another taxpayer
- Is your client being audited?**
Yes

Guide Me

Please answer the questions below so we can route you to the right place.

Next

Answered Questions

- What is your authentication type?**
eauth
- Are you logging in to review a new tax issue, or to review previous messages?**
New tax issue
- Are you registering on Secure Messaging for yourself or as an authorized representative for another taxpayer?**
I am representing another taxpayer
- Is your client being audited?**
Yes

Guide Me

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Next

Answered Questions

- What is your authentication type?**
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- Are you logging in to review a new tax issue, or to review previous messages?**
New tax issue
- Are you registering on Secure Messaging for yourself or as an authorized representative for another taxpayer?**
I am representing another taxpayer
- Is your client being audited?**
Yes

IRS | Welcome, Charlie Canvasback | Settings | Logout

Inbox 0 | Sent

Success! Thank you for signing up for IRS Secure Messaging.

You have successfully signed up for Secure Messaging.

In a few moments you will receive a welcome message. You will be able to respond to that message with any documents you are ready to submit. You will need to click refresh on your browser shortly to update your inbox and to see this message.

If you are a representative requesting copies of your client's messages, please wait until we research your case and link your account to your client. This generally takes two business days.

Secure Messaging Help

[Overview](#)

[How to use Secure Messaging](#)

[More Information](#)

[Feedback](#)

Authorized Representative Options

[Representing Other Taxpayers](#)

If you are representing another taxpayer, you can request to receive copies of the digital messages sent to them.

Authorized Representative Only

IRS | Welcome, Charlie Canvasback | Settings | Logout

Inbox 0 | Sent | Message

[← Back to Inbox](#) [↩ Reply](#)

Subject: Taxpayer - 0202 - Your POA has been linked to your case [#36379]

From: Secure Message Center

Received: 06/28/2019 03:17 PM

Attachments:

Dear Example Taxpayer,

We have completed processing your Power of Attorney request and have linked your accounts in the IRS Secure Messaging system. Future correspondence from the IRS, including Secure Messages, will be sent to both you and your authorized representative.

Please note, when it is required by statute, we will also issue correspondence through the U.S. mail.

You or your representative may respond to this message with your information from our previous request. Please try to keep your responses in digital format.

Sincerely,

Iris Representative, Clerk
Employee ID# 123456789

Secure Messaging Help

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[Feedback](#)

Authorized Representative Options

[Representing Other Taxpayers](#)

If you are representing another taxpayer, you can request to receive copies of the digital messages sent to them.

Authorized Representative Only

Impressions POA (Objectives & Demand)

- What are your first impressions?
- What do you like about it?

- What don't you like about it?
- Have you previously heard of this product?
 - o If yes, how did you hear about it?
- Is this a tool that you would use? Why or Why not? (Probe on low adoption rate)
 - o If yes, probe on what about the tool made them want to use it.
 - o If no, why haven't you used it? (**Probe to understand: is it awareness, security/trust, or legal constraint** – e.g., *if they had not heard about it, but discovered it, would they be interested in using it? Is it a concern about **security**? Is it in direct conflict of workplace rules or any statutes they follow?*)
- Have your clients ever requested this service?
 - o If yes / no, what did you tell them?

Magic Wand Question

- If you had the ability to create any tool or service to better serve taxpayers, what would it be?
- Any additional comments that you would like to add?

Closing (2 min)

- Thank you for your time! Do you have any feedback for me?
- Ask participant if they are willing to participate in future research studies to provide their contact info/business card. (e.g., "We are regularly speaking with people about this subject and others like it to improve the tax experience for citizens. Would you be willing to speak with us again to inform future products and services?")