

**Screener Guide for
 Reaching Limited English Proficient Small Business Taxpayers
 National Tax Forums 2020 – Focus Groups**

Hello, my name is _____ and I am an employee of the Internal Revenue Service. I am recruiting tax practitioners to participate in one of the focus group discussions that will be held during this tax forum. The IRS has asked me to gather ideas, opinions and experiences from tax practitioners who interact with Limited English Proficient small business taxpayers.

May I ask you two qualifying questions?

Qualifying Questions:

**1) Do you have any small business clients who have difficulty communicating in English?
(Limited English Proficient)**

If the answer is no, thank the practitioner for stopping to talk with you.

If the answer is yes, ask the following question.

2) How many clients in the past two years?

If the answer is one or two, thank the practitioner for stopping to talk with you.

If the answer is three or more, then invite the practitioner to participate in the focus group.

We would like to invite you to participate in the focus group titled “Reaching Limited English Proficient Small Business Taxpayers” with approximately nine other tax practitioners. Again, we want to hear your opinions, views and ideas. The session will take approximately 1 hour and will be held on **Enter Weekday at Enter Start Time in Focus Group Room.**

The Paperwork Reduction Act requires that the IRS display an OMB control number on all public information requests. The OMB Control Number for this focus group is 1545-1349. We estimate the time required to be one hour. Also, if you have any comments regarding the time estimates associated with this study or suggestions on making this process simpler, please write to:

Internal Revenue Service
Special Services Section
SE:W:CAR:MP:T:M:S – Room 6129
1111 Constitution Ave. NW
Washington, DC 20224

**Moderator Guide for
Reaching Limited English Proficient Small Business Taxpayers
Focus Group**

Hi! My name is _____ and I'm a focus group moderator from the Internal Revenue Service. This is my co-moderator _____.

We are seeking information about tax practitioner experiences with small business clients who are Limited English Proficient. The IRS is responsible for serving taxpayers, including those with limited English proficiency, and providing tools and guidance to meet federal tax obligations. SB/SE Research strives to provide the best service possible to our LEP small business and self-employed customers. We would like to gather feedback from tax practitioners on ways to improve the LEP customer experience and help facilitate enhancement to the tools and services we provide.

Before we start, let me ask how many of you have ever participated in a focus group before? For those of you who have not, let me explain. A focus group is a research tool used to gather ideas and opinions from a group of individuals with a common characteristic or experience by means of directed discussion.

My job as a moderator is to help guide the flow of conversation, make sure everyone's comments are heard, and ensure that questions about various aspects of the topics are covered. You will see me referring to this outline during our session. The outline includes all points I need to cover with the group; and helps me keep the discussion on track. It is important that we cover all topics. Therefore, I may at times have to break off the conversation in order to move on to another area in the guide.

In order for our discussion to move along smoothly, I would like to go over some ground rules:

- The IRS secured this room for you to speak with us.
- We only need to know your first name in order to keep the discussion moving.
- There are no right or wrong answers, but there could be different points of view.
- Everyone's opinion is valuable, so I'd like everyone to participate and be courteous to others.
- Please silence any cell phones.
- Please speak one-at-a-time, loudly and clearly.
- I will be watching our time and directing our conversation. My co-moderator will be taking notes.
- We will be here for about one hour. There will be no formal break; however, 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 are very important to us.

We are required to report to you the OMB control number for this public information request. That number is 1545-1349.

Warm Up

Just to be sure we all understand, Limited English Proficient or “LEP” individuals are those who do not speak English as their primary language and who have a limited ability to read, speak, write, or understand English.

We are only using first names in this session. Please also remember to keep all information shared in this room private, including conversations and participant names. This will allow us to adhere to privacy, disclosure and security practices during this session. We ask every participant to maintain privacy for each other.

Let's begin! Please introduce yourself, tell us how long you have been preparing returns, and the percentage of your clients who are Limited English Proficient.

Note: Go around the table or room.

Part 1: Communication and Outreach

1. Which languages are used by your small business clients?
2. Are they aware IRS offers translation services?
3. How can we reach Limited English Proficient small business taxpayers better?
4. Where do they typically go to for tax assistance?
Probe: Small Business Administration, LEP community leaders, family, friends
5. How can we help the small business LEP community understand their tax obligations?
6. Is there anything IRS can do to bridge the fear regarding taxes?

Part 2: Tools

7. What access do LEP taxpayers have to web-based tools?
Probe: No access? Smartphone only? Laptop/Desktop only? Limited internet speed?
8. Are LEP taxpayers open to using online IRS tools?
9. What is your LEP clients preferred method of interacting with IRS?
Probe: Personal interaction, phone, publications, web tools.
10. How can we provide better outreach, support, and resources?

Part 3: Suggestions for Improvement

11. What forms or publications do your small business LEP clients need translated?
Probe: Which forms, publications, instructions?
12. How can we ease the payroll deposit experience?

13. How should we educate your small business LEP clients on payroll tax filing and payment requirements?
14. Are there any other services IRS can offer to help the small business LEP community?

Conclusion

15. Are there any additional comments about the topics we covered today?

Before we conclude, I would like to check with my co-moderator to see if he/she needs any information clarified for the notes.

Thank you for sharing your thoughts and opinions today. Your participation and feedback is extremely valuable and it will provide the IRS with information to consider. Have a great day!