

Moderator's Guide

**2018 IRS Nationwide Tax Forum Focus Groups:
Evaluating the Tax Preparer Toolkit for EITC
and Other Refundable Credits**

I. Welcome and Introductions:

A. Introduction of the moderator

Good morning/afternoon. My name is <first name> and I will be your moderator for this session. I work for the Internal Revenue Service as a social scientist. Today I will be leading a discussion to get your feedback on the Tax Preparer Toolkit.

B. What is a moderator?

My job as a moderator is to:

- Help guide the flow of conversation
- Make sure everyone's comments are heard
- Ensure that questions about the topic are covered

You will see me referring to this outline during our session. The outline includes all issues I need to raise with the group, 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.

- 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. If you have any comments regarding this study, please write to: IRS, Special Services Committee, SE:W:CAR:MP:T:M:S – Room 6129, 1111 Constitution Avenue, NW, Washington, DC 20224." [NOTE: 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.
- Please speak just one at a time so everyone has a chance to participate.
- Please don't engage in side conversations-- we need for everyone to hear what the others are saying and for everything that's said to be heard.
- Sometimes I'll go around the table and ask everyone for their input. At other times, I will just open a topic for general discussion.
- We would like to hear from everyone in the group, but you don't have to answer every question.
- There are no right or wrong answers in today's discussion. We expect to hear differences in how people see things.
- Feel free to disagree. The purpose of a group session is for us to learn things in group interchanges that we don't get out of one-on-one discussions. If someone says something you disagree with, please let us know.
- If anyone needs to use the restroom, they are located <specify>.
- Your participation is voluntary. Therefore, at any point in time you may leave the room.
- If you have a cell phone, please turn it to silent.
- The session will last one hour.

D. Introduction of Participants

To begin, I'd like each of you to introduce yourself using your first name only, tell us where you are from, and how long you've been a tax preparer.

II. Discussion

As I mentioned at the start of the session, our goal today is get feedback about the use, content, and layout, of the Tax Preparer Toolkit.

A. Use

1. How often do you access the preparer toolkit?

Probe: Daily, weekly, monthly?

Probe: Continuous use or sporadic based on topic/question?

a. Are there certain times a year you use the toolkit more often?

2. What is the primary reason you visit the preparer toolkit?

Probe: Specific questions, general knowledge, client resource

3. When you first started using the preparer toolkit, what types of content did you expect to find?

B. Content

1. What content or sections of the preparer toolkit do you use the most?

2. What content or sections would you like to see added to the preparer toolkit?

3. What content or sections of the preparer toolkit do you rarely or never use?

Probe: Why is this content unused?

4. Is there any content or sections of the preparer toolkit would you like to see removed?

5. What other resources do you use for Federal tax information?

Probe: Software, web-sites, paper, Lexus-Nexus

C. Layout

1. How do you feel about the overall look and feel of the Preparer Toolkit Website?

2. Is the website easy to locate and navigate?

Probe: If easy, what makes it easy?

Probe: If difficult, what makes it difficult?

3. How do you typically access the preparer toolkit?

Probe: Desktop/Laptop, tablet, phone

a. What has been your experience accessing the toolkit on a tablet or phone?

D. Promotion and Marketing

1. How did you first learn about the preparer toolkit?
2. What would you suggest the IRS do to promote preparer toolkit?

III. Closing

Thinking about our discussion this morning/afternoon, is there anything else you would like to share regarding any of the topics we discussed.

Thank you very much for coming and sharing your ideas with us—we really appreciate your time.

Focus Group Reminder

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Focus Group Reminder

Thank you for agreeing to participate in this EITC focus group. For your convenience, we have listed the date, time and location of the session below.

Focus group date: <date>

Focus group time: <time>

Focus group location: <location>