

Invitation Phone Call

INTRO.

Hello, my name is _____ and I am calling on behalf of ICF, a market research firm working with the Internal Revenue Service (the IRS). We are conducting a paid study to gather feedback and opinions on IRS services.

Your phone number was selected from a list of phone numbers of individuals who utilized the call-back feature, instead of waiting on hold for a representative, when contacting an IRS help or product line. We are conducting three sessions of a telephone focus group. If you are eligible and decide to participate, you will receive an Amazon electronic gift card for \$75. The focus group discussion will be strictly for research, and all of your comments will be held private to the extent covered by law. Would you be interested in participating?

*The authority requesting the information is 5 USC 301. The primary purpose of asking for the information is to determine steps IRS can take to improve service 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.

YES - CONTINUE

NO - TERMINATE

//ASK IF INTRO=YES

I'd now like to ask a few questions to see if you meet the criteria that the focus group is looking for...

Q1. Did you use the call-back feature, instead of waiting on hold for a representative, when contacting an IRS help or product line?

Q2. Did you receive your scheduled call-back from the IRS?

Q3. Do you recall details and feel you remember enough to share your opinions in a group about your call-back experience?

//ASK IF Q1-3 all=YES

Thank you for answering our questions. Based on your responses, you qualify for the focus group. We would like to invite you to take part in this study. The focus group will be a discussion of customer experiences surrounding the call-back feature. Which option works best for you?

<Date and Time of Focus Group #1>

<Date and Time of Focus Group #2>

<Date and Time of Focus Group #3>

I'm glad that you will be able to join us! At this point I need to collect or confirm some contact information from you.

First name:

Last name:

Age:

Gender:

Email:

Primary phone:

Alternate phone:

Zip Code:

READ ONLY IF ASKED

Note: This information is required only as a part of this study. Your information is kept strictly private to the extent allowed by law. Your phone number is required only for a reminder call that will be made prior to the start of the research study.

Thank you. We are only inviting a few people, so if for some reason you are unable to participate, it is very important that you notify us as soon as possible so we can find someone else to take your place. Please call 802-264-3745 or email IRSSurvey@icf.com if this should happen. We look forward to having you participate on [DATE].

We are required by law to report to you the OMB (Office of Management and Budget) Control Number for this public information request. That number is <OMB #>.

Thank you for your time. We will be in touch again the day before the session to confirm your attendance.

//ASK IF Q1-3=NO

TERM. Thank you very much for your time, and thank you for answering our questions. Unfortunately, based on the requirements, we are not able to extend you an invitation. Perhaps we can include you in a future research session. Have a good [day/evening].

Confirmation email - (send shortly after they agree to participate)

Subject: Telephone Focus Group Information

Thank you for volunteering to participate in our telephone focus group to discuss the IRS call-back feature!

This focus group will take about 60 minutes to complete, and we will send you an electronic Amazon gift code for \$75 after the completion of the focus groups as a thank you for your time.

We have you scheduled for our focus group on:

Date: [date]

Time: [time] [time zone]

To confirm you will participate:

****Please reply to this email to confirm that you will be participating in this focus group.****

Prior to participating in the focus group:

Please review the attached Informed Consent document before you call in. This document details how we will use your responses and your rights as a participant in the focus group. Also, please ensure you will have a quiet area to call in from, free from noise and distraction.

Participating in the focus group:

Please call in to the conference line at least 5 minutes before the focus group is scheduled to start, so that we can be sure to begin the discussion on time.

Call-in Number: 1-855-423-6338 **Passcode:** 460905

You will be greeted by the moderator when you join. Please only use your first name when introducing yourself.

We have only invited a limited number of people to participate in this focus group. **If for any reason you cannot attend, please let us know as soon as possible** by emailing us at IRSSurvey@icf.com or calling 802-264-3745. You can also contact us if you have any questions.

Thank you,

Reminder Email (sent the day before the focus Group)

Subject: Reminder: Upcoming Telephone Focus Group

Hello,

This is a quick reminder that you are scheduled to participate in our telephone focus group to discuss the IRS call-back feature on [date] at [time] ET.

Please call in at 855-423-6338. The passcode is 460905.

If for any reason you cannot attend, please let us know right away by emailing us at IRSSurvey@icf.com or calling 802-264-3745.

We look forward to speaking with you.