

## 2020 IRS Taxpayer Experience Survey

### Focus Group Moderator Guide

#### Collecting Feedback on Trust and Communication with the IRS

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#### **Welcome and Introductions (5 min)**

Hello everyone. My name is \_\_\_\_\_ and I will be leading today's discussion. I work for ICF, a U.S. management consulting firm located just outside of Washington, D.C. We have been asked to speak with you today by the Internal Revenue Service or IRS as you likely know them. First, I want to let everyone know that I'm not an IRS employee, and I am not a tax expert. I am here to help guide the discussion as a focus group moderator and ensure we get through the questions we have to cover today. I want to hear your honest opinions about the topics we will discuss. There are no wrong answers to the questions I'm going to ask. Please relax, share your opinions and enjoy the discussion.

#### **Ground Rules**

Before we begin, I'd like to review some ground rules for today's discussion. Ground rules are our guidelines for operating so that we can complete our task in a manner that is respectful of everyone and provides all of you with the opportunity to express your thoughts safely and confidentially.

- The OMB Control Number for this study is 1545-2274. If you have any comments concerning the time estimates associated with this study or how to make this process simpler, we will provide an address to you at the completion of our discussion.
- Everything you say will be kept private to the extent allowed by law. We will use first names only, and names will not be used in any report.
- Your participation in this session is entirely voluntary. You have been invited here to offer your views and opinions, so everyone's participation is important. 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.
- It's okay to be critical. I want to hear your views and opinions about whether you like or dislike something. You do not have to reach a consensus, but please be respectful of each other's opinions.
- This session will be audio recorded. This allows us to capture everything that is being said today. We will include a summary of this discussion, and potentially some quotes as well, in a report to our client. However, we will not tie your name to anything specific you say.
- There are a few other people listening into the discussion. Some are coworkers of mine listening in to take notes. Others are from the IRS and are simply listening to hear things first hand before the report comes out; they have all signed an observer confidentiality agreement.
- You may excuse yourself from the conversation at any time for any reason.
- Please speak one at a time.
- Because we're on the phone, I ask that you say your first name before speaking so I know who is speaking. I may call on those I haven't heard from in a while.

Are there any questions before we get started?

### **Icebreaker**

To get us started, let's introduce ourselves using first names only, say where you're calling from, and briefly tell me about one of your hobbies or something you like to do for fun.

### **Providing Feedback to the IRS Service (5 min)**

1. Generally speaking, how interested are you in taking a short customer satisfaction survey following interaction with the IRS?
  - a. How interested would you be in doing a phone survey following a phone call with the IRS?
  - b. How about doing a survey after visiting an IRS office in person?
  - c. How about after visiting IRS.gov?
  - d. What would make you want to participate vs not want to participate?
  - e. What can the IRS do to encourage taxpayers like you to share feedback?

### **Interpreting IRS Questions and Answers (20 min)**

The next thing I would like for each of you to do is to consider a few questions that are asked on some IRS satisfaction surveys. I am going to read you these questions, and I do want to know your answer, but more importantly, I want to know your interpretation of the questions and your thought process when answering them. Hearing this kind of information helps us to make sure the questions are clear, and that people are using similar thought processes to answer them. These questions are all for someone who just had an interaction with the IRS. Please consider your most recent interaction with the IRS when you are thinking about these questions. If you have never had an interaction with IRS, please still consider what the questions mean to you.

The first question is: Rate the following statement from strongly agree to strongly disagree:

*This interaction increased my trust in the IRS.*

Strongly agree, agree, neither agree nor disagree, disagree, strongly disagree

2. How would you respond to this question?
3. What does your response [strongly agree, agree, neither agree nor disagree, disagree, strongly disagree] mean to you?
4. What does [opposite response] mean to you? [NOTE: If initial response is "neither agree nor disagree", probe on meaning of agree or disagree.]
5. What factors do you/would you consider when answering this question?
  - a. When providing service to taxpayers, what can the IRS do to positively impact or increase trust in the IRS?
  - b. What sort of actions lead to a decrease in trust?

6. If you have interacted with the IRS, why did your interaction have this impact on your trust in the IRS?
  - a. What, if anything, could the IRS have done differently to impact your trust?

The second question is: Rate the following statement from strongly agree to strongly disagree:

*My need was addressed.*

Strongly agree, agree, neither agree nor disagree, disagree, strongly disagree

7. How would you respond to this question?
8. What does your response [strongly agree, agree, neither agree nor disagree, disagree, strongly disagree] mean to you?
9. What does [opposite response] mean to you? [NOTE: If initial response is “neither agree nor disagree”, probe on meaning of agree or disagree.]
10. What factors do you/would you consider when answering this question?

The third question is: Rate the following statement from strongly agree to strongly disagree:

*I am satisfied with the service I received from the IRS.*

Strongly agree, agree, neither agree nor disagree, disagree, strongly disagree

11. How would you respond to this question?
12. What does your response [strongly agree, agree, neither agree nor disagree, disagree, strongly disagree] mean to you?
13. What does [opposite response] mean to you? [NOTE: If initial response is “neither agree nor disagree”, probe on meaning of agree or disagree.]
14. What factors do you/would you consider when answering this question?
  - a. For example, wait time, getting the desired outcome, etc.

### **Digital Interaction with IRS (10 min)**

Next, I want to talk specifically about digital interaction with the IRS.

15. Have you used the IRS Online Account? [If necessary: The Online Account is a secure tool available through the IRS website that allows taxpayers to view their IRS account balance including penalties and interest] Why or why not?

16. Taxpayers who may have been victims of identity theft might be asked to use the online IRS Identity Verification service. In such cases, the IRS will mail the taxpayer a letter with a unique ID. The taxpayer will use the unique ID, and another personal account number such as a credit card, car loan, or mortgage, to verify their identity through this IRS online service.
  - a. Have you heard of this service?
  - b. If so, to what extent is the system useful?
  - c. If you have not used it, to what extent would you be willing to use the system if requested by the IRS?
    - i. To what extent would you be willing to submit personal financial information to the IRS to verify your identity?
17. To what extent did your digital or online interaction with the IRS change due to COVID-19?
  - a. To what extent did your willingness to engage with the IRS digitally change due to COVID-19?
18. What can the IRS do to increase trust in digital communication and interaction with the IRS?

#### **Additional Covid-19 Issues (10 min)**

Additionally, I have some questions related to COVID-19.

19. How has your experience filing your taxes been different during the pandemic?
  - a. For example, did you have difficulty gathering the information you needed during the pandemic?
  - b. Did you receive the support you needed?
  - c. Did your preparation method change? (For example, because a tax preparation office was closed due to the pandemic or you had concerns about meeting with a tax preparer in person.)
20. To what extent did the change in the tax filing deadline have an impact on you?
  - a. Did it help you or hinder you? Did it have no impact on you?
21. Eligible taxpayers who filed tax returns for either 2019 or 2018 automatically received an Economic Impact Payment. What sources of information did you use to learn more about the Economic Impact Payment?
  - a. Did you look to the IRS to learn more? Why or why not?
    - i. Did you use the “Where’s My Stimulus Payment?” page on IRS.gov (<https://www.irs.gov/coronavirus/get-my-payment>)? Why or why not?
  - b. Which other sources did you consult?
  - c. What made these sources useful or not useful?
  - d. To what extent did you experience any confusion or difficulty finding the information you were looking for?

#### **Feedback from Military Perspective (only asking during Service Member groups) (10 min)**

22. The IRS Volunteer Income Tax Assistance (VITA) program is available at community and neighborhood centers and military installations. To what extent are you aware of this program?
  - a. To what extent have you used this program? Why or why not?
  - b. To what extent is the program useful?
  - c. If you have not used VITA, how do you prepare your taxes?
  
23. The IRS provides information specifically for Service Members on IRS.gov. To what extent are you aware of these webpages?
  - a. To what extent have you reviewed this information?
  - b. To what extent is the information useful?

### **Closing**

This concludes today's session. On behalf of the IRS, I wish to thank all of you for your participation today. As I mentioned at the beginning:

The Paperwork Reduction Act requires that the IRS display an OMB control number on all public information requests along with the address where you can send comments regarding the study. You are not required to respond unless a currently valid OMB approval number is displayed. The OMB number for this study is 1545-2274. 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.

Thanks again!