

2021 IRS Taxpayer Experience Survey

Focus Group Moderator Guide

Collecting Feedback on Spanish Language IRS Resources

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. I 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.

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. For example, [MODERATOR GO FIRST]

Getting Information about Taxes (5 min)

First, we want to know a bit more about how where you go for information about taxes.

1. Where do you go for information about completing your tax return? (*If necessary:* Such as IRS.gov, tax preparer, friends, family, trusted community partner)
 - a. Why do you prefer this source of information?
2. Where do you go for information regarding benefits the IRS provides? (*If necessary:* Such as earned Income Tax Credit (EITC) or Economic Impact Payment (EIP))
 - a. Why do you prefer this source of information?

Filing Taxes (5 min)

3. How do you usually file your tax return? (*If necessary:* Such as online or by paper)
 - a. Why do you prefer that method of filing?

Working with a Tax Preparer (5 min)

4. What factors do you, or would you, consider when identifying a tax preparer?
 - a. What makes each of those factors important to you?

IRS Spanish Language Resources and Services (30 min)

Next, we want to talk about the IRS resources and services that are available in Spanish. We want to know what you have used and how well it met your needs.

5. Taxpayers can seek assistance in Spanish through the IRS Toll-Free Line (the 1-800 number) or from the phone number located on Notice 1445 (which is 833-553-9895). Have any of you used Spanish assistance on either of these phone lines?
 - a. *If yes:* Please talk about your experience.
 - i. When did you use this resource?
 - ii. What about your experience was positive?
 - iii. What about your experience was negative?
 - iv. To what extent did this resource meet your needs?
 - v. How can problems with this resource, if any, be improved?
 - b. *If no:* Please talk about why you did not use this resource.
 - i. *If did not know about resource:* Now that you know, do you think you will use it?
6. Taxpayers can seek assistance in Spanish by visiting the Español version of the IRS website. Have any of you used the Español version of the IRS website?
 - a. *If yes:* Please talk about your experience.
 - i. When did you use this resource?
 - ii. What information were you looking for?
 - iii. What about your experience was positive?

- iv. What about your experience was negative?
 - v. To what extent did this resource meet your needs?
 - vi. How can problems with this resource, if any, be improved?
 - b. *If no:* Please talk about why you did not use this resource.
 - i. *If did not know about resource:* Now that you know, do you think you will use it?
7. Taxpayers can seek assistance in Spanish by visiting the IRS Spanish social media pages. Have any of you used visited these pages?
- a. *If yes:* Please talk about your experience.
 - i. When did you use this resource?
 - ii. What about your experience was positive?
 - iii. What about your experience was negative?
 - iv. To what extent did this resource meet your needs?
 - v. How can problems with this resource, if any, be improved?
 - vi. How can the IRS improve its Spanish social media pages?
 - b. *If no:* Please talk about why you did not use this resource.
 - i. *If did not know about resource:* Now that you know, do you think you will use it?
8. To what extent does the IRS provide sufficient digital support in Spanish? These might include IRS resources online, on social media, and other available digital tools, apps, or platforms.
9. Local IRS offices (Taxpayer Assistance Centers, walk-in centers) also provide assistance in Spanish. Have any of you received assistance in Spanish at an IRS office?
- a. *If yes:* Please talk about your experience.
 - i. When did you use this resource?
 - ii. What about your experience was positive?
 - iii. What about your experience was negative?
 - iv. To what extent did this resource meet your needs?
 - v. How can problems with this resource, if any, be improved?
 - b. *If no:* Please talk about why you did not use this resource.
 - i. *If did not know about resource:* Now that you know, do you think you will use it?
10. IRS accepts regular mail in Spanish. Have any of you corresponded with the IRS by mail in Spanish?
- a. *If yes:* Please talk about your experience.
 - i. When did you use this resource?
 - ii. What about your experience was positive?
 - iii. What about your experience was negative?
 - iv. To what extent did this resource meet your needs?
 - v. How can problems with this resource, if any, be improved?
 - b. *If no:* Please talk about why you did not use this resource.
 - i. *If did not know about resource:* Now that you know, do you think you will use it?
11. Last year, the IRS released Form 1040 in Spanish. Did any of you use this translated form?

- a. *If yes:* Please talk about your experience.
 - i. When did you use this resource?
 - ii. What about your experience was positive?
 - iii. What about your experience was negative?
 - iv. To what extent did this resource meet your needs?
 - v. How can problems with this resource, if any, be improved?
- b. *If no:* Please talk about why you did not use this resource.
 - i. *If did not know about resource:* Now that you know, do you think you will use it?
- c. Are there other tax forms or written documents that you would like to see available in Spanish?

12. What other resources or services you would like to see the IRS offer in Spanish, if any?

13. Is there anything else you'd like to tell us about the Spanish resources and services that the IRS currently offers?

Additional Available Resources (if time permits)

Additionally, we want to know a little bit more about other tax resources available in your communities.

- 14. What resources, if any, are available in your community?
 - a. What type of information do these resources provide?
 - b. What makes these resources helpful?
 - c. What could be improved about these resources?

- 15. To what extent do you get information about taxes from your friends and family?
 - a. What type of information do they provide?
 - b. How is this information shared?
 - c. What makes this information helpful?
 - d. What, if anything, is missing within this information?

- 16. To what extent do you get information about taxes through your own social media feeds (Facebook, Twitter, etc.)?
 - a. Have you seen posts or messages on social media that gave you advice or information about taxes?
 - i. Do you remember the sources of these posts?
 - b. Do you seek out information or do others share it with you unsolicited?
 - c. Can you remember anything specific about the IRS that has been shared with you on social media? What platforms did you see this on?
 - d. Have you shared any information about taxes with others on social media?
 - e. Would it be helpful if there were a legitimate source of tax information in Spanish on social media?

Wrap Up (5 min)

17. Is there anything else we should have covered during this conversation, but didn't?

Closing (5 min)

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!