

2022 IRS Taxpayer Experience Survey

Focus Group Moderator Guide

Information Needs of Early Refund Filers

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 headquartered 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 listening to hear directly from you before the report comes out; everyone on the line has 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.

Filing and getting information from the IRS

1. When do you generally start preparing to file your tax return?
 - a. If you don't prepare, why not?
2. When do you generally file your tax return?
 - a. Do you prepare and file yourself or use a paid preparer?
3. What kind of information do you get from the IRS to help you prepare and file your tax return?
 - a. When do you get this information?
 - i. *If necessary, suggest IRS.gov/getready, local tax pro or tax software reminders, media (television ads, Internet, social media)*
 - b. When would you like to get this information?
 - i. Throughout the year?
 - ii. Just at tax time?
 - c. When do you need to have this information?
 - i. Throughout the year?
 - ii. Just at tax time?
 - d. How do you generally get this information from the IRS?
 - i. Digital interaction?
 - ii. Channel hopping?
 - iii. Social media?
 - e. How easy or difficult is it to get this information?
4. To what extent do you get the information you need from the IRS?
 - a. What, if anything, is missing in this information?
 - b. What would help you be better prepared when you file? (Checklist, IRS.gov, other type of reminders)
5. How would like to receive this information from the IRS?
 - a. How can IRS communications be more proactive?
 - b. How can IRS communications be more personalized?
6. How could the IRS best communicate things like upcoming changes and access to existing programs and benefits?

Awareness of IRS campaigns/programs

The IRS has a number of programs, tools, and campaigns intended to help taxpayers file their tax returns and receive their refunds.

7. What if any programs, tools, and campaigns are you aware of?
 - a. IF AWARE, How well do these work? How well do they meet your needs? What do you like, and what do you dislike?
 - b. Let's talk about the Get Ready for Taxes annual campaign.

Get Ready for Taxes is an annual campaign that focuses on helping individual taxpayers prepare for the upcoming filing season. The fall communications and outreach efforts encourage taxpayers to take necessary actions to help them file their tax returns timely and accurately next year.

- i. Have you heard of this campaign? If yes, what have you heard? If no, what do you think of the description?
 1. What have you seen on social media about getting ready for tax season?
- ii. Did this campaign help you in any way to prepare for filing your taxes?
- iii. Even if the campaign was helpful, what steps did you still have to take to prepare and file your taxes?

c. Let's talk about the Interactive Tax Assistant.

Interactive Tax Assistant is a prep tool that asks you a series of tax questions that guide you to a response tailored to your situation.

- i. Have you heard of this tool?
- ii. Have you used this tool to answer a question or help determine if they can claim a specific credit?
- iii. If you have used it, how well did it help you? To what extent did it help you to prepare and file your taxes when you wanted to?
- iv. Even if the tool was helpful, what steps did you still have to take to prepare and file your taxes?
- v. If you have not used the tool, why not?

Transparency

Next, let's talk about your assessment of transparency at the IRS

8. Generally, speaking, how transparent do you think the IRS is?
9. Generally, speaking, how transparent is the information you get from the IRS?
10. What level of transparency would you like there to be?
11. What kinds of things could be made more transparent?
12. What communications from the IRS could be made more transparent?
13. Could communications from the IRS increase your assessment of transparency at the IRS?

Trust

Next, let's talk about your feeling of trust in the IRS.

14. Generally speaking, to what extent do you trust the IRS?
15. Generally, speaking, to what extent do you trust the information you get from the IRS?
16. How could the IRS communicate with taxpayers in a way that would build trust in the IRS?
17. What kind of information could the IRS provide taxpayers that would build trust in the IRS?

Communication/Information from IRS Partners

In addition to the IRS, many taxpayers look to other organizations to provide information they need to complete their tax returns.

18. What, if any, other organizations provide information you need to complete your tax return?
 - a. VITA sites?
 - b. Community organizations?

19. What kind of information do you get from these organizations to help you file your tax return?
 - a. When do you get this information?
 - b. When would you like to get this information?
 - i. Throughout the year?
 - ii. Just at tax time?
 - c. When do you need to have this information?
 - i. Throughout the year?
 - ii. Just at tax time?
 - d. How do you generally get this information from the organizations?
 - i. Digital interaction?
 - ii. Social media?
 - e. How easy or difficult is it to get this information?
20. To what extent do you get the information you need from these organizations?
 - a. What, if anything, is missing in this information?
21. How would you like to receive this information from these organizations?
 - a. How can communications be more proactive?
 - b. How can communications be more personalized?
22. How could these kinds of organizations best communicate with you?

Ask if time permits-

Telephone Customer Service

23. What does customer service mean to you as a taxpayer?
24. What is most important to you when you call the IRS to get assistance?
 - a. What else is important to you?
25. How could the IRS improve phone service to taxpayers?

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!