

2024



Tax Forum

IRS Nationwide



Chicago, IL
July 9-11

Orlando, FL
July 30 - August 1

Baltimore, MD
August 13-15

Dallas, TX
August 20-22

San Diego, CA
September 10-12

IRS Focus Groups

The Internal Revenue Service (IRS) looks forward to your participation in the 2024 IRS Nationwide Tax Forum. As we have in prior years; we invite you to share your experiences and discuss innovative ideas with us in our focus groups, interviews, and usability studies. The IRS will conduct in-person focus groups, interviews, and usability studies this year at each tax forum location.

Your willingness to participate in IRS-conducted focus groups, interviews, and usability studies is completely voluntary.

Focus groups are scheduled for one hour, with eight to ten participants. Participants who meet the qualifying criteria are invited to attend the focus group. Participation is on a first come, first serve basis. Interviews are typically 20 minutes or less. Usability studies are scheduled for one hour with each participant. We appreciate you taking time to meet with IRS research staff to share your thoughts and ideas on the topics below.

Descriptions of focus group, interview, and usability study topics are listed below along with the qualifying criteria for participation. Sign up is available at the Focus Group Booth located near the Tax Forum Registration table.

W&I Strategies and Solutions (WISS) Topic 1: Working for the IRS

Description: The paid preparer community possess many of the educational and experiential qualifications that are attractive to the IRS. However, few individuals consider the IRS as an employer. This focus group will seek to understand why qualified applicants may pass on the opportunity to work for the IRS, and how the IRS can increase the number of qualified, diverse applicants responding to external job searches.

Qualifying Criteria: All tax practitioners.

W&I Strategies and Solutions (WISS) Topic 2: Exploring innovative approaches to increase/enhance refundable credit taxpayer participation.

Description: This focus group will gather feedback on tax preparer's thoughts and opinions on how to increase and enhance refundable credit taxpayer participation. This session supports the goals of the Refundable Credits Program Management (RCPM) office to encourage eligible taxpayers to apply for the credits and explore new approaches to increase participation.

Qualifying Criteria: Tax practitioners familiar with refundable credits (i.e., EITC, CTC, AOTC).

W&I Strategies and Solutions (WISS) Topic 3: Evolving Service Technologies: Enhancing Experience through Electronic Submission and Customer Call-back.

Description: This focus group will explore the shift towards new service technologies, specifically through the integration of online interactions with the centralized authorization file and the customer callback feature. We will ask participants questions about changes to user experience and ways to encourage adoption. This session aims to understand the barriers and incentives providers and their customers face involved in moving from traditional service modes like faxing and waiting on hold to streamlined electronic services and scheduled callbacks.

Qualifying Criteria: All tax practitioners.

W&I Strategies and Solutions (WISS) Topic 4: Simple Notice Initiative

Description: The Internal Revenue Service (IRS) recently announced that the Simple Notice Initiative will simplify and update notices for taxpayers. The initiative aims to use plain language and concise communication to inform taxpayers about potential tax issues and necessary actions. Approximately 170 million notices are sent to individual taxpayers every year. Join us and your fellow tax practitioners for a discussion on notice design, content, and readability. We would like to hear your feedback on the Simple Notice Initiative and how we can make it easier for your clients to understand their letters. Your insights will help improve these redesigning efforts of clarifying notices and letters to deliver a better taxpayer experience.

Qualifying Criteria: Tax practitioners with clients who have recently received a notice in the mail regarding their individual federal taxes.

W&I Strategies and Solutions (WISS) Topic 5: IRS Online account communication features: Secure email, chat, and video chat.

Description: This focus group will gather information from tax preparers regarding their preferences and expectations for potential digital communication options that may become available in the near future as a part of the IRS Online Account (OLA). These communication options include Live Instant Chat, Asynchronous Messaging/Email, and Live Video Chat. This group will also discuss preferences regarding digital notices. Participants will also provide feedback regarding the habits and preferences of their clients as they relate to these topics. Findings from this focus group will be used to make informed decisions about the best way to serve those using the OLA.

Qualifying Criteria: Tax practitioners that use the OLA or have clients that use the OLA.

Customer Account Services (CAS) Topic 1: Electronic Payments – Making Payments Easier for You and Your Clients

Description: Taxpayers and their representatives expect their financial interactions with the government to be seamless and secure, whether they are paying their taxes or receiving a refund. This focus group entails a discussion with third-party payors about how they currently make tax payments for themselves and their clients and their knowledge of the electronic payment options for tax obligations. During the session we hope to gain knowledge of practitioner awareness of new electronic payment options and potential benefits and barriers to both them and their clients.

Qualifying Criteria: Tax practitioners who have made payments to the IRS.

SB/SE Focus Group Topic 1: Online Tools

Description: As more transactions in our daily lives move online, the IRS recognizes the importance of developing tools and applications that make it easier for you and your clients to interact with us. In this session, you will have the opportunity to share your experience using our online tools, what improvements and new features you want to see, and why—or why not—you and your clients choose to use these tools to enter into payment plans, make payments, and file missing returns. Join this opportunity to help the IRS reduce barriers and make the online experience as seamless as possible. Be prepared with your ideas about Online Account, Online Payment Agreement, Offer in Compromise Pre-qualifier, and more.

Qualifying Criteria: Tax practitioners who (1) have assisted clients with unpaid balances or missing returns, and (2) are aware of IRS online collection tools to enter into payment plans, make payments, or file delinquent tax returns. Please visit the Focus Group Booth for more information and to sign up.

SB/SE Focus Group Topic 2: Reasonable Cause Penalty Relief

Description: Are penalties part of a fair and balanced tax system? Your expertise is invaluable to us! We invite you to participate in a focus group discussion on Reasonable Cause Penalty Relief to understand your experiences, challenges you face, and explore opportunities for improvement. Your perspectives can influence policy and streamline procedures, ultimately benefitting both taxpayers and practitioners alike. Join us in this crucial discussion to ensure that Reasonable Cause Penalty Relief criteria align with real-world scenarios and facilitate fair outcomes. Your voice matters- let's work together to enhance the effectiveness of penalty relief mechanisms for a more efficient and equitable tax system.

Qualifying Criteria: Tax Practitioners who are familiar with Reasonable Cause Penalty Abatement criteria with regards to Failure to File, Failure to Pay, and Failure to Deposit penalties. The participant should have experience with submitting a penalty abatement request within the last two years. Please visit the Focus Group Booth for more information.

SB/SE Focus Group Topic 3: Digital Asset Transactions

Description: Dive with us into the World of Digital Assets! Join our upcoming focus group to share your insights on the complexities of tax laws surrounding digital asset transactions. Whether you're navigating the realm of cryptocurrencies, non-fungible tokens, or other digital assets, your experiences matter. Let's discuss how effectively the IRS communicated these laws to taxpayers and practitioners and brainstorm

improvements together. Your expertise can drive meaningful changes in this rapidly evolving landscape. Don't miss this opportunity to shape the future of digital asset taxation.

Qualifying Criteria: Tax Practitioners who serve clients with digital assets, like virtual currency and non-fungible tokens (NFTs). We invite you to join this focus group to discuss better methods to communicate important issues, how you feel the IRS handles your concerns, and more efficient ways the IRS can help taxpayers understand digital asset taxation.

Please visit the Focus Group Booth for more information.

SB/SE Focus Group Topic 4: Written Information Security Plan

Description: Data security is of ever-increasing importance-- The IRS is dedicated to not only helping you comply with federal data safety regulations, but also making sure your practice is safe from data breaches. In 2022, we developed Publication 5708 (Creating a Written Information Security Plan for your Tax & Accounting Practice) for these reasons. Did you find it useful? How can we improve? Join this focus group to share your feedback, experiences, and challenges when dealing with data security, directly with IRS researchers. Let's help protect you and your clients' personal data together!

Qualifying Criteria: Tax practitioners who are responsible for creating, approving, or maintaining a Written Information Security Plan. Please visit the Focus Group Booth for more information and to sign up.

SB/SE Focus Group Topic 5: High Income Field Examinations

Description: The IRS recognizes the importance of the taxpayer experience and as SB/SE evolves its audit strategy it is essential to hear from you to learn the most balanced strategy moving forward. Want to share your experiences with high income taxpayer audits? You will have a chance to share your experiences, thoughts on remote vs in-person audits, ideas for improvements and efficiency. Don't miss out! Please visit the Focus Group Booth for more information.

Qualifying Criteria: Tax practitioners who serve high income taxpayers with SB/SE audit experience. Please visit the Focus Group Booth for more information.

SB/SE INTERVIEW Topic 6: Heavy Highway Vehicle Use Tax

Description: The IRS is looking for your help to improve the process for filing Form 2290 Heavy Highway Vehicle Use Tax Return. As IRS works to modernize its processes and forms, hearing from tax practitioners and those with experience using them is important, this an opportunity to participate in a one-on-one interview and help the IRS understand how to bring Form 2290 into the future. You will have a chance to share your experience, expertise, the actions you take in filing, and how we can make the process easier for you. Please visit the Focus Group Booth for more information.

Qualifying Criteria: Tax practitioners who filed or interacted with clients who filed Form 2290 Heavy Highway Vehicle Use Tax. Please visit the Focus Group Booth for more information.

TAS Focus Group Topic 1: IRS Online Accounts and Tax Pro Accounts

Description The IRS recognizes the importance of modernizing its technology to assist tax professionals electronically. Tax Pro Account is a digital self-service portal for tax professionals to manage authorized relationships and access client tax information. We are interested in your input on what services are used, how well the services work, and what new features should be added. We also want to know about your account authentication experience. Suggestions for improvement will be requested.

Qualifying Criteria: Tax practitioners who have experience using IRS Tax Pro accounts and individual online accounts or have a working knowledge of services available.

TAS Focus Group Topic 2: Appeals Alternative Dispute Resolution (ADR)

Description: ADR is a tool the IRS uses to resolve tax disputes without litigation and expedite the process. When these programs are successful, they expedite resolution of a tax controversy, saving time and money, eliminating the need for litigation, reducing the burden on taxpayers and the IRS, and protecting taxpayer rights. TAS is interested in gathering input from you regarding your knowledge and experience with ADR and we will request your suggestions for improvements to the process.

Qualifying Criteria: Tax practitioners who have experience dealing with or working knowledge of the IRS Alternative Dispute Resolution (ADR) program.

TXO Focus Group Topic: Practitioner journey using IRS resources and applications

Description: Are you a tax practitioner familiar with navigating IRS digital resources such as IRS.gov, Tax Pro Account, or the Document Upload Tool? Have you ever had to call the IRS to resolve an issue for your client? Have you ever used the Practitioner Priority Service (PPS) phone line? If you have used any of these services, we want to hear from you! Join our focus group discussion where we'll delve into how tax professionals like yourself use IRS services and resources to resolve issues for your clients. We're particularly interested in understanding your decision-making process when selecting a path to resolve an issue as well as any challenges you may face along the way. By sharing your experiences and insights, we aim to develop targeted solutions that enhance the future of IRS services for both taxpayers and tax professionals.

Qualifying Criteria: Tax practitioners who have called the IRS **AND** used any IRS digital or online services in the past three years. Please visit the Focus Group Booth for more information.

Online Services Usability Testing: Tax Pro Account and IRS.gov

Description: The IRS offers an online account that lets tax professionals manage authorizations, view tax information for individual and business clients and act on their behalf. We're expanding Tax Pro Account and want to find out what features would be most useful to you. We also want to learn how you use IRS.gov and make sure our resources are easy to find. The Office of Online Services will use your feedback to improve Tax Pro Account and IRS.gov.

Qualifying Criteria: Tax Practitioners who have at least one year of experience and a CAF number. Tax practitioners who submit either form 2848 or form 8821. Tax practitioners who have limited or no experience with Tax Pro Account are welcome.

Online Services Interviews: Future Self-Service Solutions

Description: The IRS is committed to improving the customer experience by empowering tax professionals. We are developing several tools that aim to give users seamless access to IRS assistance, resources, and self-service capabilities. As such, we are seeking feedback on the current experiences of tax pros when they attempt to contact the IRS via the Priority Practitioner Service (PPS) line, their preferences for future communication solutions, and their attitudes towards a direct filing option. The Office of Online Services will use this feedback to help prioritize new features and tools.

Qualifying Criteria: Tax practitioners who have experience with contacting the IRS via phone, secure messaging, chat, mail or any other methods.

The Paperwork Reduction Act requires that IRS provide an OMB Control Number on all approved public information requests. That number is OMB 1545-1349. You may send comments and questions regarding this process or suggestions for making it simpler to the following name and address: Internal Revenue Service, Special Services Section, SE:W:CAR:MP:T:M:S, Room 6129, 1111 Constitution Avenue, NW, Washington, DC 20224.
