

VI. Attachments

Attachment A, Part 1— Moderator’s Guide for Usability Testing

Greet participant and thank him or her for coming. Ask participant to take a seat and if he or she had any trouble finding the site. Have participant complete questionnaire.

Important: Remind sites to administer the consent and release forms ahead of time.

Introduction of Moderator and Notetaker (10 minutes)

Welcome, and thank you for coming today. My name is _____ and this is _____. We are from the Kleimann Communication Group, an independent consulting firm in Washington, DC. Before we get started, I did want to let you know that I will be reading from a script. We are talking with a number of people this week and we want to be sure we say the same thing in the same way to everyone.

The material we are testing today is part of a major project initiated by the Internal Revenue Service to improve their toll-free telephone service system. We are working with the Internal Revenue Service to collect information about taxpayer perceptions of the IRS telephone system. We’re here because we and the Internal Revenue Service think we can learn a great deal from you. We want to learn what works and what doesn’t for taxpayers like you. Then IRS may revise the messages on their call systems based on our results. So what you tell us is very important.

(If observers behind mirror) Behind the mirror are observers who have been involved in this project and are very interested in hearing your thoughts. We can meet them at the end of the session if that would make you more comfortable.

I will be leading today’s session and _____ will be taking notes to help us remember what you say. We will be audio- and video-taping this session to ensure that we collect complete information. The entire session will take about an hour and a half and we can take a break about half-way through the session if you’d like.

Confidentiality

I just want to confirm that you have read and signed the consent and release forms. I want to assure you that all of the information we collect here today is confidential. For example, we do not have you put your name on the questionnaire, so your answers cannot be identified as yours. In addition, we will not use your name, address, or any other identifying information in reports, papers, or videos based on this research.

START TAPE

About the Session

In a few minutes, I am going to ask you to call the “Live Telephone Assistance for Individuals” toll-free number and complete certain tasks over the speakerphone. I will also have some questions to ask, but please remember there are no right or wrong answers. We are not testing you. We are testing the toll-free telephone service system and want to learn from you so we can improve it.

Also, here are some materials (pen and paper) that you may have at home. If you need to use these materials, please feel free.

Do you have any questions before we begin?

Task 1: Scenario A (20 minutes)

Here is a scenario for you to look over. (Hand participant scenario)

For this scenario, I want you to imagine that you've just sat down to do your taxes, but you've realized you don't have a Form 1040. You've decided to call the IRS toll free number to obtain this form. Please dial 1-800-829-1040 using this speaker phone and work through the menu options to obtain a Form 1040. Once you're done, you can hang up and I'll have some questions for you.

Do you have any questions about your task?

Allow participant time to complete task.

Thank you for working through the toll free telephone system. I would like to follow up with a few questions.

1. On a scale from 1 to 7, with 1 being very easy and 7 being very difficult, how easy or difficult was it to navigate through the prompts to obtain a tax form using the IRS telephone system? Why?
2. Was there any point when you were unsure of which menu option to choose? Why?
3. Do you think the telephone system menu is set up in a way that most taxpayers would understand?
4. Do you have any suggestions for improving the IRS telephone system?
5. Any other comments you'd like to share?

Task 2: Scenario B (20 minutes)

Here is a scenario for you to look over. (Hand participant scenario)

In this scenario, I want you to pretend that you are at home, you've got your Form 1040 in front of you, and you're not sure whether you can claim your stepdaughter as a dependent. You've decided to call the IRS toll-free number to find the answer to this question. If you are asked to enter a SSN, please use "111-11-1111." Please dial 1-800-829-1040 using this speaker phone and work through the menu options to find the information you need. Once you're done, you can hang up and I'll have some questions for you.

Do you have any questions about your task?

Allow participant time to complete task.

6. On a scale from 1 to 7, with 1 being very easy and 7 being very difficult, how easy or difficult was it to navigate through the prompts to find information about dependents through the IRS telephone system? Why?
7. Would the average taxpayer be able to follow the menu to be able to ask a question about dependents?
8. Was there any point when you were unsure of which menu option to choose? Why?
9. Do you have any suggestions for improvement?
10. Any other comments you'd like to share?

Task 3: Scenario C (20 minutes)

Here is a scenario for you to look over. (Hand participant scenario)

For this next scenario, I want you to pretend that you've already completed your taxes and you are expecting a refund from IRS of \$7870. You've decided to call the IRS toll free number to check on the status of your refund. Again, please call 1-800-829-1040 to find this information and I'll have some questions for you when you're done.

Here is some information you may or may not need.

Filed a form 1040 (**not** a 1040 EZT)
Social Security Number- 111-11-1111
Filing Status: single
Refund amount: \$7870.00
Mailed return: June 1, 2007

Do you have any questions about your task?

Allow participant time to complete task.

11. On a scale from 1 to 7, with 1 being very easy and 7 being very difficult, how easy or difficult was it to navigate through the prompts to check the status of your refund through the IRS telephone system? Why?
12. Do you think the average taxpayer would be able to find information about the status of a refund through the IRS telephone system?
13. Was there any point when you were unsure of which menu option to choose? Why?
14. Do you have any suggestions for improvement?
15. There was a point in the telephone system where you were asked to enter your social security number. How did you feel about that?
16. Would you be more or less comfortable to share your social security number over an IRS toll free number than a private company's toll free number (for instance, a bank or credit card)?
17. To check your refund status, the system tells you you need your SSN, filing status, and refund amount from your tax return. Would you be able to enter your social security number without looking it up? (Probe: how would you know it?)

18. Would you know your filing status without having to look it up? (Probe: how would you know it?)
19. Would you know your exact refund amount without having to look it up? (Probe: how would you know it?)
20. Any other comments you'd like to share?

Task 4: Scenario D (20 minutes)

Here is a scenario for you to look over. (Hand participant scenario)

For this scenario, I want you to pretend that you've just made a payment to IRS and you want to know if IRS has received your payment. You've decided to call the IRS toll-free number to find this information. If you are asked to enter a SSN, please use "111-11-1111." Again, please call 1-800-829-1040 to find out if IRS has received your payment and I'll have some questions for you when you're done.

Do you have any questions about your task?

Allow participant time to complete task.

21. On a scale from 1 to 7, with 1 being very easy and 7 being very difficult, how easy or difficult was it to navigate through the prompts to check the status of your payment through the IRS telephone system? Why?
22. Do you think the average taxpayer would be able to find information about whether IRS has received a payment?
23. Was there any point when you were unsure of which menu option to choose? Why?
24. Do you have any suggestions for improvement?
25. Any other comments you'd like to share?

Task 5: Scenario E (20 minutes)

Here is a scenario for you to look over. (Hand participant scenario)

For this scenario, imagine that you have been asked to provide your 2006 tax information for a pending loan. You want to call IRS to have a copy of this information sent to you. If you are asked to enter a SSN, please use "111-11-1111." If you are asked to enter a street address, please use 4545 Zeb Way. Again, please call 1-800-829-1040 to have a copy of your 2006 tax information sent to you and I'll have some questions for you when you're done.

Do you have any questions about your task?

Allow participant time to complete task.

26. On a scale from 1 to 7, with 1 being very easy and 7 being very difficult, how easy or difficult was it to navigate through the prompts to have a copy of your 2006 tax information sent to you? Why?
27. Do you think the average taxpayer would be able to find information about obtaining a copy of your tax information?
28. Was there any point when you were unsure of which menu option to choose? Why?
29. What does the word "transcript" mean to you?
30. One of the prompts says, "To request a transcript or photocopy of your tax return or a transcript of your account press 3" What does "transcript of your tax return" mean to you? What does "photocopy of your tax return" mean to you? What does "transcript of your account" mean to you?
31. Do you have any suggestions for improvement?
32. Any other comments you'd like to share?

Wrap-up

Thank you. That was your last task, now I have a few general questions for you before we finish up.

33. Please take a look at the following. (Give participant a piece of paper with the following information on it) This is a script of the menus you hear when you first call in. Please take a moment to look at the script. Then, I will have a few questions to ask.

Intro to Phone Line 1-800-823-1040

Welcome to the Internal Revenue Service. Your call may be monitored or recorded for quality purposes.

- Para continuar en español, oprima el ocho.
- For questions about preparing or filing your individual tax return or tax related rules and regulations, press 1
- For questions about your refund, payment, or account, press 2
- For the business and specialty line or the IRS Web address, press 3
- To hear these options again, press 9

34. What is your initial reaction to the full script?

35. Are you concerned about the call being monitored or recorded?

36. Does the ordering of the options make sense?

37. Is there anything you would change?

38. What is your understanding of the word “account?” (point to word in option 2)

39. Now that you’ve used the IRS toll-free number to complete several tasks, what is your overall opinion of the IRS phone system? (Allow participant to respond. **Probe:** What do you like? What do you dislike? Is there anything you find confusing or unclear? What?)

40. The 1-800 number is often referred to as the “Live Telephone Assistance for Individuals Toll Free Number.” What do you think about that name? Why?

41. Do you have any suggestions for improving the IRS phone system beyond those you’ve already shared with us? (**Probe:** for the tone, menu options, clarity of information, and sequence)

42. On the current IRS system, once you are placed in a queue for a customer service representative, you hear music while you wait and every few minutes a message repeats to remind you that you are on hold. IRS is considering adding an “estimated wait time” feature. This feature would tell callers approximately how long the wait is before their call is answered. For instance, “your estimated wait time is 5-7 minutes.” Do you think this would be a helpful feature? Why or why not?
43. Estimated wait times are approximate, meaning they could be longer or shorter. Would you prefer to hear an estimated wait time, or hear music and be reminded that you are on hold? Why?
44. If your estimated wait time was 3-5 minutes and you were on hold for 7 minutes, what would you do? How would you feel about that?
45. What factors do you consider when you decide to hold or hang up?
46. What is a reasonable amount of time to wait? Why?
47. How many times per year would you say you call any of the IRS toll-free numbers?
48. For what reasons have you, or would you, call any of the IRS toll-free numbers? Why?
49. When you need to call IRS, where do you look to get a number to call?
50. What are features that you like in a telephone system? By telephone system, I mean the automated system that answers your call to a 1-800 number. (Moderator-provide examples only if no response, wait time, how to talk to a CSR, etc)
51. What are features that you don't like in a telephone system?
52. (Moderator: show screen shot of IRS website) Here is a screen shot of the first page of the IRS website for you to look at. How often per year would you say you use the IRS website for information?
53. If you have used the IRS website, what were your general impressions of the website? If you haven't used it, what are your general impressions of the screen shot of this first page?
54. (If used the website before) Were you able to find the information you were looking for?

55. When would you use the IRS toll free number and when would you use the IRS website?

56. Any other comments?

Conclusion

Thank you for your time and all the comments you have given us. We appreciate your help! Do you have any questions for me? (Answer, if possible). You can pick up your payment at the desk out front (or wherever the testing facility designates).

Thanks!

The Paperwork Reduction Act requires IRS to display an OMB Control Number (1545-1349) on all public information requests. If you have any comments about this Confidentiality Agreement and Consent Form and/or testing session, please write to the IRS Tax Products Coordinating Committee, SE:W:CAR:MP:T:T:SP, 1111 Constitution Ave, NW, Washington, DC 20224.

Attachment A, Part 2— Moderator’s Guide for Focus Group Testing

Pre-Discussion Administrative Activities

Greet participants as they arrive. Ask them to take a seat and make themselves comfortable. Also make sure that everyone has name tents (first names only on both sides).

Distribute the questionnaire and consent forms as participants enter the room and collect completed consent forms and questionnaires at the beginning of the session.

Introduction of Moderator and Notetaker

Welcome, and thank you for coming today. My name is _____ and this is _____. We are from the Kleimann Communication Group, an independent consulting firm in Washington, DC. Before we get started, I did want to let you know that I will be reading from a script. We are talking with a number of people over the next three weeks and we want to be sure we say the same thing in the same way to everyone.

Today, we are going to ask for your opinions and comments about toll free help lines, particularly the Internal Revenue Service Live Telephone Assistance for Individuals Toll Free Number, 1-800-829-1040. This research is part of a major project initiated by the IRS to improve the customer experience of callers to their phone system. We’re here because we and the Internal Revenue Service think we can learn a great deal from you. We want to learn what works and what doesn’t work from taxpayers like you. So what you tell us is very important.

(If observers behind mirror) Behind the mirror are observers who have been involved in this project and are very interested in hearing your thoughts. We can meet them at the end of the session if that would make you more comfortable.

I will be moderating today’s session and my colleague will be taking notes to help us accurately collect your comments. We will be audio-taping this session to ensure that we collect complete information. The entire session will take about 90 minutes. If you need to go to the restroom at any time during the session, please feel free to do so. The restrooms are located _____.

Confidentiality

I just want to confirm that you have all read and signed the consent forms. I want to assure you that all of the information we collect here today is confidential. For example, we do not have you put your name on the questionnaire that we’ve asked you to complete, so your answers cannot be identified as yours. In addition, we will not use

your name, address, or any other identifying information in reports, papers, or other information based on this research.

Instructions

We are very interested in what you have to say during our time together today. However, sometimes, I may interrupt the discussion to make sure that we cover everything on our agenda.

We're going to use several guidelines during this session:

- First, it's okay **not** to respond to every question I ask. You may not have a comment on every topic, but please remember that all of your comments are very important to us. Please feel free to tell us whatever you're thinking throughout the session. There are no right or wrong answers. We just want to know what you think.
- Second, please do not hold side conversations. We want to hear from everyone and side conversations make that difficult.
- Third, we want to make sure that everyone can hear what you say, so please speak up.
- Fourth, everyone should self-monitor. Please be courteous when speaking. We want everyone to have a chance to speak.
- Fifth, we are required by law to report to you the OMB control number for this public information request. That number is 1545-1349.

Do you have any questions so far?

Participant Introductions

Now, let's go around the room and have each of you introduce yourself to the group by giving your first name. Remember, please only give the group your first name. I'll start. My name is _____.

Introduction to Focus Group Session

How many of you have participated in this type of focus group before? (Ask for a show of hands and record responses.)

Today, we want to find out what all of you think about toll free numbers—why you use them, what features you like and dislike, and what IRS can do to improve its toll free telephone service system. Let me start with a few questions to the group:

- 1) How many of you have called a 1-800 number to get information?
- 2) When do you usually call a 1-800 number?
- 3) What are features that you like in a telephone system? By telephone system, I mean the automated system that answers your call to a 1-800 number. (Moderator-provide examples only if no response, wait time, how to talk to a CSR, etc)
- 4) What are features that you don't like in a telephone system?
- 5) Have you ever had to enter personal information in a phone system such as a phone number or social security number? How did you feel about that?

Let's talk more specifically about IRS' help services. To help refresh your memory, here is a screen shot of the first page of the IRS website. (Show Screen Shot of IRS website)

- 6) How many of you have used the IRS website to get information?
- 7) How many times a year do you go to the IRS website?
- 8) For those of you who have visited the IRS website, what were your impressions?
- 9) Were you able to find the information you were looking for?
- 10) How many of you have called the IRS toll free number with a question?
- 11) When you need to call IRS, where do you look to get a number to call?
- 12) How many times a year do you call the IRS toll free number?
- 13) When would you use the IRS toll free number and when would you use the IRS website?
- 14) For those of you who have called the IRS toll-free number, what were your impressions?
- 15) Often phone systems will ask for identifying information from you in order to access your account. These can be things like your home phone number or your social security number. Would you be more or less comfortable to share your social security number over an IRS toll free number than a private company's toll free number (for instance, a bank or credit card)?
- 16) On the current IRS system, once you are placed in a queue for a customer service representative, you hear music while you wait and every few minutes a message repeats to remind you that you are on hold. IRS is considering adding an "estimated wait time" feature. This feature would tell callers approximately

how long before their call is answered. For instance, “your estimated wait time is 5-7 minutes.” Do you think this would be a helpful feature? Why or why not?

- 17) Estimated wait times are approximate, meaning they could be longer or shorter. Would you prefer to hear an estimated wait time, or hear music and be reminded that you are on hold?
- 18) If your estimated wait time was 3-5 minutes and you were on hold for 7 minutes, what would you do? How would you feel about that?
- 19) What factors do you consider when you decide to hold or hang up?
- 20) What is a reasonable amount of time to wait? Why?

Survey and Closing Remarks

The last thing I'd like to ask you to help us with is a short survey. Please read through the survey and answer the questions. You can hand me the survey as you leave.

Are there any questions that I can answer before we end our session? Thank you very much for participating in today's focus group. The information you provided has been very helpful.

Thank you again for your participation.

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Attachment B, Part 1— Participant Recruitment

We are recruiting a total of 56 taxpayers in four sites: Denver, CO; San Francisco, CA; Tulsa, OK; and Boston, MA, to participate in the testing. Participants will be recruited to mirror typical U.S. taxpayers in race/ethnicity, age, marital status, gender, income, and filing method (electronic vs. paper). All of the participants must be able to read and speak English. We are proposing the following additional requirements for the participant population:

Age	Mix 10%-20% over 65 10%-20% under 25
Education	Mix 20% high school or less No more than 20% advanced or professional degrees
IMF/BMF	At least three IMF at each site At least three BMF at each site
ESL	10%-20%
File own tax return	100%
Total	56 participants

Attachment B, Part 2— Participant Recruitment Telephone Script

1. Hello, my name is **[first and last name]**. May I speak to **[name]**?

If someone other than R asks why you are calling, say: I'm calling regarding an important study of taxpayer communication.

(Check one answer)

- No one by that name at this number
- Speaking to R:R comes to the phone → Go to question 3

2. Confirm you have dialed correctly. Ask if respondent was ever at this number (do they have his/her new number)?

If no new number is given, finalize as not located.

3. Hello, my name is **[your name]** and I'm calling from **[marketing company's name]** for the Kleimann Communication Group. The Kleimann Communication Group, along with the Internal Revenue Service, is conducting a study of taxpayer perception of phone systems, specifically the IRS toll free number.

We have chosen you to participate in an interview being held during the week of _____, **2007**. In this interview, we will ask you to perform a series of tasks and give your opinions about the IRS toll free numbers.

4. We will pay you **[\$___ for individuals or \$___ for small business owners]** at the end of the interview for your participation. Do you have a few minutes to answer some pre-qualifying questions? (if "No," what would be a convenient time to call back?)

Include if necessary: (We are not selling anything, we are looking to recruit people to help out with a nationwide study IRS is conducting. Everything you say is confidential, and your identity or other identifying information is not given to IRS.)

If needed: The exact location of the interview is

(Check One Answer)

- Yes
- No → Call back time _____
- Refuse → Terminate. Thank respondent.

5. Are you a tax professional? (Do you prepare taxes for a living?)

- Yes → Terminate. I am sorry, but you do not fit the background we need for participation in this particular study. Thank you for talking with us.
- No

6. Did you pay federal income taxes for 2006?

- Yes
- No → Terminate. I am sorry, but you do not fit the background we need for participation in this particular study. Thank you for talking with us.

7. Which tax form did you complete for the year 2006?

- 1040EZ
- 1040A (Head of Household)
- 1040 (Individual)
- 941 (Employers Quarterly Tax Return)
- 940 (Employers Annual Federal Unemployment Tax)
- 1065 (Return of Partnership Income)
- 1120 (Corporation Income Tax Return)
- Not Sure

8. For your individual tax return, what filing status did you use?

- Single
- Head of Household
- Married, Filing Separately
- Married, Filing Jointly

9. Did you file a Schedule SE (Self-Employment Tax) for the year 2006?

- Yes
- No

10. Who was the primary person working on and filing the tax form?

- I was
- A friend
- A family member
- A tax preparer
- Other

10a. If you had questions about your tax return, would you personally contact IRS or would you have someone else find answers?

- I would contact IRS
- I would have someone else contact IRS

11. Do you own a small business?

- Yes
- No

12. Do you primarily read and speak English at home?

- Yes → *Go to question 13*
- No → Terminate. I am sorry, but you do not fit the background we need for participation in this particular study. Thank you for talking with us.

13. Do you speak English as a second language?

- Yes
- No

14. Are you married?

- Yes
- No

15. What is your race? You may select one or more than one category:

- American Indian or Alaskan Native
- Asian
- Black or African-American
- Native Hawaiian or other Pacific Islander
- White

- Hispanic/Latino

16. What is your current age?

- 18-24
- 25-34
- 35-44
- 45-54
- 55-64
- 65+

17. Are you currently unemployed?

- Yes
- No

18. What is the highest level of education you have completed?

- Less than high
- High school or GED
- Some college or a 2-year college program
- College graduate
- Graduate school

I will now give you the interview times that we have available. The interviews will take no longer than 90 minutes. (Calendar to be updated before each call.) **[Revise this calendar as necessary.]**

Day and Date					

- No, can't make those times → thank for time, end of interview
- Refuse → thank Respondent for time, end of interview

I will send you a letter confirming the time and date of the interview, and giving you the exact location of the interview. The letter will include a number for you to call if you have any questions. In order to send you the letter, I need to have your current address.

If marketing group does not have address listed, ask Respondent to give a current address and list below.

If marketing group has address listed, ask if it is still correct:

(Check One Answer)

- Yes, address is correct → continue
- No, address is not correct → make corrections below, then continue.

Address: _____

City/state/zip: _____

And to make sure I send it to the right person, can I check the spelling of your name?
(Verify name is correct as listed, make any changes below.)

(Check One Answer)

- Yes, name is correct → continue
- No, name is not correct → make corrections below, then continue

R's correct name: _____

We will need to call you the day before the interview to remind you about the appointment. Is it OK to call you at this number?

(Check one answer)

- Yes, ok to call this number → continue
- No, call different number → record number below

Number to call to remind R: _____

**Thank you for your help. I'm glad you can come to the interview.
Please watch for a reminder letter from (marketing company's name).**

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Attachment B, Part 3— Acknowledgment Letter to Participants

[Date]

Dear **[participant]**:

Thank you for agreeing to participate in the research being conducted by Kleimann Communication Group for IRS. Below are the date, time, and location that we have reserved for you. We are also attaching directions for you.

[Date, time, and location here]

If you cannot keep this appointment, please call us at **[local number here]**.

We look forward to meeting you and having your valuable insights for this important research.

Sincerely,

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Attachment B, Part 4—Participant Reminder Telephone Script

1. Hello, my name is **[first and last name]**. May I speak to **[name from confirmed participant list]**?

Speaking to R:R comes to the phone → skip to question 3

If someone other than R asks why you are calling, say: I'm calling regarding an important study of taxpayer communication that **[name from confirmed participant list]** is participating in. Is **[confirmed participant]** in?

2. If no, ask, may I leave a message for him or her? Go to question 3

3. My name is **[first and last name]** and I'm calling from **[marketing company's name]** for the Kleimann Communication Group to confirm **[name of confirmed participant's or your]** participation on **[date and time]** for the taxpayer communication study. Will you still be able to make it?

If leaving a message say, will you please give **[name of confirmed participant]** this message and have them call me at **[telephone number]** to confirm that they will be able to make it.

Thank participant or person taking message.

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Attachment C, Part 1— Confidentiality Statement and Consent Form

The Kleimann Communication Group is working on a project for the Internal Revenue Service (IRS). We are not employees of IRS.

This project will collect information about IRS toll free telephone assistance with the aim of improving customer experience. We want to assure you that we maintain the confidentiality of your identity and participation in this project.

This form is to inform you of your rights as you talk with us today. We want you to understand the following:

- Your participation is completely voluntary. You do not have to answer any questions you do not want to.
- You may stop participating at any time.
- Your answers and comments will be kept confidential. Your name or personal information will not be used in any report for this project.
- The interview will take no more than 90 minutes to complete.
- We are videotaping and audiotaping our session with you but it is only so that we can review your comments and accurately describe them.
- Even if you sign this form, you can stop participating at any time.

If you agree to help us, please print your name, then sign and date this form below.

We thank you for your participation in this important project to improve government communication with the American public.

Your Name (please print): _____

Your Signature: _____

Today's Date: _____

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Attachment C, Part 2— Video Release

The IRS is interested in making a video-tape of this process in an effort to internally share the results of this study with the phone system team who will be trying to improve the customer experience. At most, a clip of your interview would be included in the video-tape of the process.

- No other identifying information would be included about you.
- If you do not give permission for your image to be used, it will not be used.
- Giving or not giving permission will not exclude you from participating.

If you agree to let us use your image, please print your name, then sign and date this form below.

We thank you for your participation in this important project to improve government communication with the American public.

Your Name (please print): _____

Your Signature: _____

Today's Date: _____

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Attachment D—Participant Questionnaire

Thank you for agreeing to meet with us today. Before we begin our work, we ask that you take a moment to fill out a brief questionnaire. We will use this information to help us report our findings to IRS. We will not use your name in our reports. Please check the appropriate boxes.

1. What is your gender?

- Male
- Female

2. What is your age?

- 24 or younger
- 25 to 34
- 35 to 44
- 45 to 54
- 55 to 64
- 65 or older

3. Are you married?

- Yes
- No

4. Do you have any children under the age of 18?

- Yes, how many? _____
- No

5. What is your race? You may select one or more than one category.

- American Indian or Alaskan Native
- Asian
- Black or African-American
- Native Hawaiian or other Pacific Islander
- Hispanic or Latino
- White

6. What is the highest level of education you have completed?

- Less than high school
- High School or GED
- Some college or a 2-year college program
- College graduate
- Graduate school

7. What is your current annual household income?

- Less than \$25,000?
- \$25,000 to \$44,999?
- \$45,000 to \$64,999?
- \$65,000 to \$84,999?
- \$85,000 to \$99,999?
- \$100,000 or more?

8. Are you currently employed?

- Full-time
- Part-time
- Unemployed
- Student
- Other: _____

6. Which federal tax form did you file for 2006?

- 1040EZ (simplest of the forms, no dependents, taxable income below \$50,000)
- 1040A (taxable income below \$50,000, capital gain distribution, no itemized deductions, deductions only for IRA contributions and education related expenses)
- 1040 (taxable income above \$50,000, itemized deductions, more complex investments and other income)
- 940
- 941
- 1065
- 1120
- Not Sure

7. Who was the primary person working on and filling in the tax form?

- I was
- A family member or friend
- An accountant
- A tax service, for example, H&R Block
- Other: _____

8. Which filing status did you use?

- Single
- Head of Household
- Married, Filing Jointly
- Married, Filing Separately
- Other: _____
- Not Sure

9. If you are a business owner, which federal tax forms did you file for 2006?

- 940
- 941
- 1065
- 1120
- Other _____

10. Have you ever received a tax refund from the IRS?

- Yes
- No
- Not Sure

Thank you. You have finished the questionnaire.

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