



2009 e-Preparer FG Study Among Tax Preparers

RESPONDENT INFO

RESPONDENT ID# _____ (1-5)

SCREENER TO BE USED WITH RECRUITS IN THESE 4 CITIES - NOTE: ALL ARE 100+ RETURN PREPARERS:

- New York NY.....Non-Users Of e-File (NO e-Filed Returns AND 75%+ V-Coded). .(DATE & TIME TBD).....1 ...09
San Francisco CA.Non-Users Of e-File (NO e-Filed Returns AND 75%+ V-Coded). .(DATE & TIME TBD).....2
Chicago IL.....Heavy Users Of e-File (95%+ e-Filed Returns).....(DATE & TIME TBD).....3
Tampa FL.....Light Users Of e-File (1-49.9% e-Filed Returns).....(DATE & TIME TBD).....4

ADDRESS _____ CITY _____ ST _____ ZIP _____

PHONE # (AC-_____) _____

E-MAIL ADDRESS TO BE USED IN EMAILING LIST OF CURRENT ELECTRONIC OFFERINGS AT IRS.GOV:

ENTER E-MAIL ADDRESS PRECISELY & CONFIRM TWICE _____

RECORD DATE, TIME & DISPOSITION FOR EACH ATTEMPT AT SCREENING/RECRUITING THIS PERSON.

Table with columns: DATE, TIME, Disc, NA, Unavail, Ref, NQ, Comp. Rows 1-10.

INTERVIEWER _____

AFTER REACHING A POTENTIAL PARTICIPANT ON THE IRS-PROVIDED INITIAL SCREENING LIST, INTRODUCE YOURSELF: Hello, I am _____ of Russell Research, an independent national survey research firm. The Internal Revenue Service has asked us to contact tax professionals in your area about participation in a research study. Let me assure you this is not a sales call and your participation in this survey is entirely voluntary. This survey should take just 4 minutes of your time. Will you take a moment to speak with me? (IF RESPONDENT AGREES TO PARTICIPATE CONTINUE WITH...)

First, some questions about you and possible participation in this study.

RECRUITING STAFF: Qs 1-2-3 ARE FOR INFORMATION PURPOSES ONLY AND ARE NOT SCREENING

- 1. For the record, are you male or female? (CIRCLE ANSWER BELOW.) Male..... 1 Female..... 2
2. Which of the following best describes your age? (CIRCLE ANSWER BELOW.) 18-35..... 1 36-55..... 2 56 or Over..... 3 (DO NOT READ, BUT CIRCLE IF:) Refused.....y

3. Which, if any, of the following tax-related trade or professional organizations are you a member of. (READ LIST & CIRCLE ANSWER.)

AARP Tax Aide.....	1	...23
American Association Of Attorneys--CPAs - or AAACPA.....	2	
American Institute Of CPAs - or AICPA.....	3	
American Payroll Association - or APA.....	4	
Association Of Payroll Management - or ASPM.....	5	
Council for Electronic Revenue Communication Advancement - or CERCA.....	6	
Federation Of Tax Administrators - or NFTA.....	7	
National Association Of Tax Practitioners - or NATP.....	8	
National Society Of Accountants - or NSA.....	9	
National Association Of Enrolled Agents - or NAEA.....	1	...24
National Center For Professional Education - or NCPE.....	2	
National Association Of Computerized Tax Processors - or NACTP.....	3	
If You're A Member Of <u>Some Other Organization</u> , Please Name It (SPECIFY).....	x	
If You Do Not Belong To Any Tax-Related Trade Or Professional Organization, Please Say So.....	y	

NOTE: ALL POTENTIAL FOCUS GROUP PARTICIPANTS WILL HAVE BEEN PRE-QUALIFIED FROM INFORMATION AVAILABLE ON THE IRS ETA PREPARER DATABASE AS 100+ RETURN PREPARERS WHO FIT THE CRITERIA DETAILED FOR THE FOCUS GROUP IN EACH CITY AT THE TOP OF PAGE 1, SO NO VERBAL SCREENING IS REQUIRED. THIS LEAVES ONLY QUESTIONS OF WHETHER QUALIFIED PARTICIPANTS (Q4) EVER VISIT IRS.GOV FOR PREP AND FILING INFO AND (Q5) WHETHER THEY WILL AGREE TO THE "HOMEWORK" EXERCISE BUILT INTO THE STUDY - THIS EXERCISE IS DESIGNED TO ASSURE THAT FG PARTICIPANTS SPEAK FROM SOME KNOWLEDGE WHEN DISCUSSING CURRENT ELECTRONIC OFFERINGS FOR PREPARERS AT IRS.GOV.

4. Do you ever visit the IRS's website, irs.gov, for information about tax preparation and filing or for other information services? (CIRCLE ANSWER.)

Yes (CONTINUE WITH Q5).....	1	...24
No (THANK & DO NOT RECRUIT).....	2	

5. You qualify to participate in a focus group discussion we're conducting with Tax Professionals in your area. However, before participating in this focus group, Tax Professionals have to provide an e-mail address, let us e-mail them a short list of Tax Preparer information services at irs.gov, and then go to irs.gov and review those information services before coming to the focus group discussion and discussing these as well as other information services with other Tax Professionals. The incentive for participation is this discussion is \$125, which is awarded to participants upon completion of the focus group discussion. Would you be willing to go to irs.gov, review the information services we e-mail you, and then come to a focus group discussion related to those types of Preparer information? (CIRCLE ANSWER.)

Yes (CONTINUE WITH "E-MAIL RECORDING AND FG ADDRESS/LOCATION INFORMATION").....	1	...24
No (THANK & DO NOT RECRUIT).....	2	

E-MAIL RECORDING AND FG ADDRESS/LOCATION INFORMATION: Thank you for agreeing to participate in the focus group and for being willing to go to irs.gov and review information services beforehand. To e-mail you that list of information services at irs.gov, I'll now need to get your exact e-mail address. (RECORD E-MAIL ADDRESS IN BOX ON PAGE 1. IF POSSIBLE, E-MAIL THE LIST OF IRS.GOV INFO SERVICES TO THE RESPONDENT IMMEDIATELY AND CHECK HIS/HER RECEIPT WHILE STILL RECRUITING IN THIS PHONE CALL.) **NOTE: THE INFO POINTS IN THE E-MAIL WILL BE PROVIDED BY IRS BEFORE THE START OF RECRUITING.**

Please note that the group discussion will cover what you see at irs.gov, but it will also involve more than just the irs.gov information and services - it will cover all types of electronic information and electronic communication with the IRS. The discussion will be held at our research facilities at (ADDRESS) on (DATE) at (TIME) and you'll be spending about an hour and a half with us. Your participation is voluntary, and again, as a thank you for taking the time to help us, we'll have a \$125 cash gift for you at the end of the group discussion.

CLOSING COMMENTS: Thank you for your time. We are required by law to report to you the OMB (Office Of Management and Budget) Control Number for this public information request. That number is 1545-1349. In addition, if you have any comments on ways to improve this research process, you can write to the IRS. Would you like the address? (IF YES, ADDRESS IS...) IRS Tax

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