



**2009 IRS Marketing Materials
FG Screener For TAXPAYERS**

RESPONDENT INFO

RESPONDENT ID# _____ (1-5)

Market & FG Times

Market #1 TBD Focus Group #1 - Self-Prepared V-Coder Taxpayers: Date TBD 5:30PM.....1 ...09

Market #1 TBD Focus Group #2 - Self-Prepared Paper Taxpayers Who Are Free File Eligible: Date TBD 7:30PM2

Market #2 TBD Focus Group #1 - Paid-Prepared V-Coder Taxpayers: Date TBD 5:30PM.....3

Market #2 TBD Focus Group #2 - Self-Prepared V-Coder Taxpayers Who Are Free File Eligible: Date TBD 7:30PM 4

Market #3 TBD Focus Group #1 - Self-Prepared Paper Taxpayers: Date TBD 5:30PM.....5

Market #3 TBD Focus Group #2 - Self-Prepared V-Coder Taxpayers: Date TBD 7:30PM.....6

Market #4 TBD Focus Group #1 - Self-Prepared Paper Taxpayers: Date TBD 5:30PM.....7

Market #4 TBD Focus Group #2 - Paid-Prepared Paper Taxpayers: Date TBD 7:30PM.....8

CITY _____ ST _____ ZIP _____

PHONE # (AC-____) _____

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

	DATE: _____	TIME: _____	(am) (pm)	Disc	NA	Unavail	Ref	NQ	Comp	
1	DATE: _____	TIME: _____	(am) (pm)	1	2	3	4	5	6	...12
2	DATE: _____	TIME: _____	(am) (pm)	1	2	3	4	5	6	...13
3	DATE: _____	TIME: _____	(am) (pm)	1	2	3	4	5	6	...14
4	DATE: _____	TIME: _____	(am) (pm)	1	2	3	4	5	6	...15
5	DATE: _____	TIME: _____	(am) (pm)	1	2	3	4	5	6	...16
6	DATE: _____	TIME: _____	(am) (pm)	1	2	3	4	5	6	...17
7	DATE: _____	TIME: _____	(am) (pm)	1	2	3	4	5	6	...18
8	DATE: _____	TIME: _____	(am) (pm)	1	2	3	4	5	6	...19
9	DATE: _____	TIME: _____	(am) (pm)	1	2	3	4	5	6	...20
10	DATE: _____	TIME: _____	(am) (pm)	1	2	3	4	5	6	...21

INTERVIEWER _____

LISTS PROVIDED BY IRS WILL BE DRAWN TO ASSURE THAT ALL RESPONDENTS QUALIFY FOR THE SPECIFIC SEGMENT THAT WE ARE SCREENING FOR (AS OUTLINED IN THE BOX ABOVE).

WHEN SCREENING FOR THE 8 TAXPAYER GROUPS -
AFTER REACHING A POTENTIAL RESPONDENT, INTRODUCE YOURSELF WITH:

Hello, I am _____ of Russell Research, an independent national survey research firm. The Internal Revenue Service has asked us to contact Taxpayers in your area about participation in a research study. Let me assure you this is not a sales call. 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.

1. For the record, are you male or female? (CIRCLE ANSWER BELOW.)

Male.....1 ...22
Female.....2

LOOSELY QUOTA FOR 50% MALE & 50% FEMALE.

2. Which of the following best describes your age? (CIRCLE ANSWER BELOW.)

- Under 18.....1 ...23
- 18-25.....2
- 26-35.....3
- 36-45.....4
- 46-55.....5
- 56-64.....6
- 65-74.....7
- 75 Or Over.....8
- Refused.....9

RECRUITERS: MONITOR GENDER AND AGE AND REPORT ONGOING PROPORTIONS TO PROJECT STAFF TO AVOID SKEWS. THE GOAL IS TO RECRUIT A MIX OF AGES (UNLESS A GROUP IS SPECIFIED AS

NOTE: WE'RE ASKING Q. 3 EVEN THOUGH WE WILL HAVE IDENTIFIED FROM THE IRS DATABASE (AND INCLUDED IN THE SCREENING LIST) O-N-L-Y TAXPAYERS WHO WE KNOW ALREADY QUALIFY FOR EACH TYPE OF GROUP. THE PURPOSE OF ASKING THIS QUESTION IS AVOID HAVING TAXPAYERS CLAIMING OTHERWISE DURING THE GROUPS.

3. Did you file a Federal Income Tax Return earlier this year - that is, in early 2009 - for Tax Year 2008? (CIRCLE ANSWER BELOW.)

- Yes (CONTINUE TO Q. 4).....1 ...24
- No (THANK & DO NOT RECRUIT ANYONE CLAIMING NOT TO HAVE FILED IN '09).....2**

4. Who actually prepared the Federal Income Tax Return that you filed in your name earlier this year - that is, in early 2008 - for Tax Year 2007? (CIRCLE ANSWER BELOW.)

- You/Yourself (CONTINUE SCREENING WITH Q4 FOR SELF-PREPARED GROUPS).....1 ...24
- A relative **(THANK & DO NOT RECRUIT)**.....2
- A friend **(THANK & DO NOT RECRUIT)**.....3
- A paid tax preparer (CONTINUE SCREENING WITH Q4 FOR PAID-PREPARED GROUPS).....4
- An unpaid tax preparer**(THANK & DO NOT RECRUIT)**.....5
- Someone at an IRS Taxpayer Assistance Center **(THANK & DO NOT RECRUIT)**.....6
- Or by someone else **(THANK & DO NOT RECRUIT)**.....7

5. How do you feel about preparing and submitting your Federal Income Tax return using a computer and electronic filing? Is this something you would considering doing, or not? (CIRCLE ANSWER BELOW.)

- Yes (CONTINUE TO PARTICIPATION IF OTHERWISE QUALIFIED).....1 ...24
- No (THANK & DO NOT RECRUIT ANYONE AVERSE TO ELECTRONIC PREPARATION AND FILING) 2**

PARTICIPATION OFFER: We'd like you to join us, along with other Taxpayers, in a group discussion of tax filing and marketing materials which the IRS might use to communicate with Taxpayers. To participate, you would come to our research facilities at (ADDRESS) on (DATE) at (TIME) and spend about an hour and a half with us, discussing these topics. Your participation is voluntary, and as a thank-you for taking the time to help us, we'll have a \$100 cash gift for you at the end of the group discussion. Will you help us?

CLOSING COMMENTS: Thank you for agreeing to participate in the study. 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 Products

Coordinating Committee, SE:W:CAR:MP:T:T:SP, 1111 Constitution Ave. NW, Washington, DC 20224.