

**IRS – Wage and Investment Research and Analysis (WIRA)
TAB Conjoint Update
Focus Group Screener**

Recruit 2 focus groups total by phone; recruit 9 per group for 8 to show
• *Recruit 3 taxpayers who prepare return by hand per group*

Hello, my name is _____ and I work for _____. We are a marketing research company that is working with the IRS to improve IRS services, and to better understand your needs and your interactions with the IRS. You will not be asked about your specific tax situation, but only about your experience with completing your federal tax return.

Would you be willing to participate in a one-hour telephone discussion with about six other individual taxpayers? **As a token of our appreciation for your time, you will receive \$50.**

Do you have a few minutes to answer a couple of questions? Your participation is voluntary, but your help on this project would be very much appreciated. *[If respondent says yes, proceed with interview].*

1. Who was the main person who prepared your most recent federal taxes? Was it:

- You (yourself)
- Other
- [recruit for a mix]*

[If self-preparer in Q1, ask:]

2. How did you prepare your most recent federal tax return?*[read list]*

- By hand.....1
- By hand and computer.....2
- By computer

3. Record Gender (Don't not ask this question)

[recruit a mix if possible]

- Male.....1
- Female.....2

We appreciate the valuable information you just provided us. The focus group will take place on the **(date and time)**.

We'd like your mailing address so that we know where to send the honorarium check to.

Name _____

Phone number _____

Address _____

We would also like to give you a reminder call prior to the focus group. If we wanted to contact you during regular working hours, should we reach you at the number stated above or at another number? [*Record number*_____].

The Paperwork Reduction Act required that IRS provide an OMB Control Number on all approved public information requests. That number is OMB XXXX-XXXX. Also, if you like, I can give you a name and address where you can send comments and questions regarding this process or suggestions for making it simpler.

Send your comments and suggestions to:

Internal Revenue Service
Tax Product Coordinating Committee
1111 Constitution Avenue NW
Washington, DC 20224

Thank you and have a nice day. We look forward to meeting with you on (DATE).