



2008 IRS Marketing Materials
FG Screener For TAX PROFESSIONALS

RESPONDENT ID# _____ (1-5)

THIS SCREENER IS USED WITH THE FOLLOWING RED-FONTEDED FOCUS GROUPS IN THIS STUDY

New York City Metro Focus Group #1 - V-Coder Taxpayers: DATE TBD 6:00PM ...09

New York City Metro Focus Group #2 - V-Coder Tax Professionals: DATE TBD 8:00PM.....2

Dallas Metro Focus Group #1 - V-Coder Taxpayers: DATE TBD 6:00PM

Dallas Metro Focus Group #2 - General (Non-V-Coder) Taxpayers: DATE TBD 8:00PM

Los Angeles Metro Focus Group #1 - V-Coder Taxpayers: DATE TBD 6:00PM

Los Angeles Metro Focus Group #2 - V-Coder Tax Professionals: DATE TBD 8:00PM.....6

CITY _____ ST _____ ZIP _____

PHONE # (AC-____) _____

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

Table with 10 rows and 8 columns: DATE, TIME, (am) (pm), Disc, NA, Unavail, Ref, NO, Comp. Includes row numbers 1-10 and continuation numbers ...12 to ...21.

INTERVIEWER _____

WHEN SCREENING FOR THE 2 TAX PROFESSIONAL GROUPS - AFTER REACHING A POTENTIAL RESPONDENT, INTRODUCE WITH:

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. 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

NO QUOTAS/GOALS FOR GENDER IN TAX PROFESSIONAL GROUPS.

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

RECRUITING STAFF: WE EXPECT GENDER AND AGE SKEWS AMONG TAX PROFESSIONALS, BUT STILL REPORT THIS TO PROJECT STAFF FOR ANALYSIS PRIOR TO THE PROFESSIONAL GROUPS..

NOTE: WE'RE ASKING Q. 4 EVEN THOUGH WE WILL HAVE IDENTIFIED FROM THE IRS DATABASE (AND INCLUDED IN THE SCREENING LIST) O-N-L-Y TAX PROFESSIONALS WHO V-CODE RETURNS AT THE 50%+ LEVEL. THE PURPOSE OF ASKING THIS QUESTION IS TO MAKE THE TAX PROS AWARE THAT WE'RE AWARE THEY FILE RETURNS VIA V-CODE AND AVOID SITUATIONS WHERE A TAX PROFESSIONAL MIGHT CLAIM OTHERWISE WHEN SEATED IN A GROUP COMPRISED OF OTHER TAX PROFESSIONALS.

3. **Thinking back to the past 2008 tax season (covering Tax Year 2007), did any of your client Federal Income Tax Returns involve preparing the return using software, but then printing out the return and mailing it in to the IRS?** (CIRCLE ANSWER.)

- Yes (CONTINUE TO PARTICIPATION OFFER)..... 1 ...24
- No (THANK & DO NOT RECRUIT IF THEY CLAIM NOT TO HAVE FILED RETURNS THIS WAY IN'08) 2**

PARTICIPATION OFFER: We'd like you to join us, along with other Tax Professionals, in a group discussion of tax filing and marketing materials which the IRS might use to communicate with Tax Professionals and 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 matters. Your participation is voluntary, and 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. 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.