



**2008 IRS Marketing Materials  
FG Screener For TAXPAYERS**

**RESPONDENT INFO**

RESPONDENT ID# \_\_\_\_\_ (1-5)

THIS SCREENER IS USED WITH THE FOLLOWING **RED-FONTE**D FOCUS GROUPS IN THIS STUDY

- New York City Metro Focus Group #1 - V-Coder Taxpayers: DATE TBD 6:00PM.....1**      ...09
- New York City Metro Focus Group #2 - V-Coder Tax Professionals: DATE TBD 8:00PM
- Dallas Metro Focus Group #1 - V-Coder Taxpayers: DATE TBD 6:00PM.....3**
- Dallas Metro Focus Group #2 - General (Non-V-Coder) Taxpayers: DATE TBD 8:00PM.....4**
- Los Angeles Metro Focus Group #1 - V-Coder Taxpayers: DATE TBD 6:00PM.....5**
- Los Angeles Metro Focus Group #2 - V-Coder Tax Professionals: DATE TBD 8:00PM

CITY \_\_\_\_\_ ST \_\_\_\_\_ ZIP \_\_\_\_\_

PHONE # (AC-\_\_\_\_) \_\_\_\_\_

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

	DATE: _____	TIME: _____	(am) (pm) .....	<u>Disc</u>	<u>NA</u>	<u>Unavail</u>	<u>Ref</u>	<u>NQ</u>	<u>Comp</u>	
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 \_\_\_\_\_

WHEN SCREENING FOR THE 4 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

**IN SCREENING FOR TAXPAYERS, 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

**RECRUITING STAFF: MONITOR GENDER AND AGE AND REPORT ONGOING PROPORTIONS WITH PROJECT STAFF TO AVOID SKEWS. PROJECT STAFF WILL CHECK PROPORTIONS VS. EXPECTED E-FILE USAGE**

**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 (V-Coders AND NON-V-Coders). 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 2008 - for Tax Year 2007? (CIRCLE ANSWER BELOW.)

- Yes (CONTINUE TO PARTICIPATION OFFER)..... 1 ...24
- No (THANK & DO NOT RECRUIT ANYONE CLAIMING NOT TO HAVE FILED IN '08)..... 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 matters. 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.