

Attachment A – Draft Questionnaire with Probes

INTRO

Hello, this is _____ calling on behalf of the Internal Revenue Service, the federal tax collection agency. The IRS is trying to improve its services by asking customers about their experiences and opinions. This interview is being conducted for the IRS by an independent national research organization, SRBI, so that your answers will be confidential and no personal identifying information will be released to the IRS. **(Verify that you are speaking with an adult over age 18.)**

(If Spanish Speaker responds) Do you speak English?

Yes **(Continue)**

No **(Say “I am sorry” and hang up and call back in Spanish)**

REFCON TACK-UP

(If respondent is hesitant, read:)

Your answers will help the Internal Revenue Service in finding ways to improve the level of service they provide to taxpayers.

(If respondent is still hesitant, read:)

The interview is strictly confidential. We are bound by law not to link the answers you give with any information that could be used to identify you. Neither the IRS nor anyone else will know who you are or what answers you personally provided. We do this so that you can be comfortable in telling us what you really think, not what you think the government wants to hear.

(If respondent is still hesitant, read:)

It doesn't take very long and we can schedule it at a time convenient to you. We need to represent the opinions of busy people like you, as well as people who have more time, to present an accurate picture to the IRS of what the public thinks and wants.

(If not familiar with filing taxes, or not adult in household, read:) I need to speak to the adult in the household who is the most familiar with filing taxes. May I please speak to that person?

(If asks about length, read:) The survey will take about 30 minutes to complete. However, if you are unable to complete the survey at this time, we can call you back at your convenience.

(If asks how they were selected, read:) You were randomly selected from all households in the U.S. with telephone numbers. The IRS does not know your identity, and we are prohibited from ever disclosing your name or number to the IRS or to anyone else.

Note and probe any hesitation points in answering questions – possible general probes: Was that easy or hard to answer?”, or “I noticed you hesitated – can you tell me what you were thinking?”

1. How familiar are you with the Economic Stimulus Act of 2008?

- 1.very familiar
2. Somewhat familiar
3. Niether familiar or unfamiliar
4. Somewhat unfamiliar
5. Very unfamiliar

Probe: What does the phrase Economic Stimulus Act mean to you?

2. What sources did you use to get information about the Economic Stimulus Act (check all that apply)?

1. Television News
2. Newspaper
3. On-line News
4. Letter from IRS
5. IRS.gov
6. Called the IRS
7. Friends/family
8. Paid Preparer/tax professional
9. Other _____

Probe: Were there other sources of information that you used?

3. Of the sources you listed above, what was your main source of information regarding the Economic Stimulus Act? _____

4. If yes to IRS.gov in Q3- You indicated you visited IRS.gov to obtain information regarding the ESA, Please rate your satisfaction with the following aspects of IRS.gov

- Ease of finding information
- Amount of information
- Online ESA payment calculator
- ESA FAQ

5. The IRS sent taxpayers a letter explaining the Economic Stimulus Act, what taxpayers needed to do to get the payment, how to the amount of the payments would be calculated and when the payments would be received, did you receive this letter?

1. Yes
2. No (go to Q6)

5a. How many letters regarding the ESA did you receive from the IRS?

1. 0
2. 1
3. 2
4. 3
5. more than 3

Probe: how do you remember that you received X number of letters? Can you tell me how the letters were different? Do you remember approximately when you received the letters?

5b. Thinking about the first letter you received from the IRS regarding the ESA, did you read this letter?

1. Yes
2. No (go to Q)

5c. In thinking about your experience with the first letter, please indicate the level to which you agree or disagree with the following statements:

- | | SD | D | N | A | SA |
|---|----|---|---|---|----|
| 1. The language was understandable. | | | | | |
| 2. The layout was difficult to follow. | | | | | |
| 3. The size of the print was easy to read. | | | | | |
| 4. The tone of the notice was appropriate. | | | | | |
| 5. The section headings (if any) were helpful. | | | | | |
| 6. The notice contained all the information I needed. | | | | | |
| 7. The contact information was difficult to locate. | | | | | |

5d. How would you rate your overall satisfaction with the first letter you received from the IRS regarding the ESA?

1. very satisfied
2. somewhat satisfied
3. neither satisfied or dissatisfied
4. somewhat dissatisfied
5. very dissatisfied

6. The IRS sent some taxpayers a package with a special 1040a and instructions on how to complete the 1040a to receive their economic stimulus payment, did you receive this package from the IRS?

1. Yes
2. No (go to Q7)

Probe: What does the term “package with special 1040a” mean to you?

Thinking about the package with the special 1040a,

6a. Was it clear why you received the package?

1. Yes
2. No

6b. Did you understand what action(s) you were required to take?

1. Yes
2. No

6c. Did you take the required action?

1. Yes
2. No

7. Did you contact the IRS about economic stimulus payment or not?

1. Yes
2. No (go to Q8)

7a. How many times did you contact the IRS about the economic stimulus payment?

1. I didn't contact the IRS
2. 1 time
3. 2 times
4. 3 times
5. 4 or more times

Probe: How do you remember how many times you contacted the IRS?

7b. How did you contact the IRS, the first time, about the economic stimulus payment?

1. Visited a walk-in office
2. Called the IRS toll-free number
3. Mailed correspondence
4. Visited the irs.gov website

7c. Thinking about the first time you contacted the IRS about the economic stimulus payment, what was your main reason for contacting the IRS?

1. To find out when I will receive the economic stimulus payment
2. To find out the amount of the economic stimulus payment
3. I didn't understand the notice
4. I didn't receive my economic stimulus payment on time
5. I didn't receive the right amount
6. To find out why I wasn't eligible for the economic stimulus payment
7. Other (please specify)_____

Probe: What other reasons did you have for contacting the IRS regarding your economic stimulus payment?

7d. When you contacted the IRS the first time, how satisfied were you with the information you received on economic stimulus payment from the IRS?

1. Very satisfied
2. Satisfied
3. Neither satisfied nor dissatisfied
4. Dissatisfied
5. Very dissatisfied

7e. How did you contact the IRS, the second time, about the economic stimulus payment?

1. Visited a walk-in office
2. Called the IRS toll-free number
3. Mailed correspondence
4. Visited the irs.gov website

7f. Thinking about the second time you contacted the IRS about the economic stimulus payment, what was your main reason for contacting the IRS?

1. To find out when I will receive the economic stimulus payment
2. To find out the amount of the economic stimulus payment
3. I didn't understand the notice
4. I didn't receive my economic stimulus payment on time
5. I didn't receive the right amount
6. To find out why I wasn't eligible for the economic stimulus payment
7. Other (please specify)_____

Probe: What other reasons did you have for contacting the IRS the second time?

7g. When you contacted the IRS the second time, how satisfied were you with the information you received on economic stimulus payment from the IRS?

6. Very satisfied
7. Satisfied
8. Neither satisfied nor dissatisfied
9. Dissatisfied
10. Very dissatisfied

8. Did you receive an Economic Stimulus payment?

1. Yes
2. No

Probe: What does the term Economic Stimulus payment mean to you?

9. How did the amount you actually *received* for your stimulus payment compare to the amount you *expected*?

- (1) It was *less* than I expected
- (2) It was *about the amount* I expected
- (3) It was *more* than I expected

10. If you did not get the amount you expected, what do you think are some reasons why?

Probe: What other reasons did you not get the amount you expected?

11. Rate your satisfaction with the IRS in informing you of the *amount* you were to receive for your stimulus payment?

1. very satisfied
2. somewhat satisfied
3. neither satisfied or dissatisfied
4. somewhat dissatisfied
5. very dissatisfied

12. Did you receive your economic stimulus payment,

1. Sooner than expected
2. When expected
3. Later than expected

13. Rate your satisfaction with the IRS in informing you of when you would receive your economic stimulus payment?

1. very satisfied
2. somewhat satisfied
3. neither satisfied or dissatisfied
4. somewhat dissatisfied
5. very dissatisfied

14. How can the IRS improve the service we provide to taxpayers on the economic stimulus payment? (please specify)

Probe: Is there anything else you can think of the IRS could have done to provide better service on the economic stimulus package?

15. Do you speak a language other than English at home?

1. Yes
2. No

15a. If yes, what is that language? (optional question)

1. Spanish
2. Chinese
3. Vietnamese
4. Korean
5. Russian
6. Other

15b. How well do you speak English?

1. Very well
2. Well
3. Not well
4. Not at all

16. Do you have any of the following long-term conditions (lasting 6 months or more)? (Select all that apply)

1. Blindness
2. Deafness
3. Severe Vision Impairment
4. Severe Hearing Impairment
5. Severe Speech Impairment
6. A condition that substantially limits my physical abilities (such as standing or walking)
7. A condition that limits learning or remembering
8. None of the above
9. I do not have a long-term condition

17. Which of the following categories describes your current age?

- 17 years and under
- 18 to 24
- 25 to 34
- 35 to 44
- 45 to 54
- 55 to 64
- 65 to 74
- 75 to 84
- 85 years and over

18. Which of the following categories describes your household income before taxes last year?

(Stop when the income level is reached).

- Less than \$3000
- \$3000 but less than \$10,000
- \$10,000 but less than \$15,000
- \$15,000 but less than \$25,000
- \$25,000 but less than \$35,000
- \$35,000 but less than \$50,000
- \$50,000 but less than \$75,000
- \$75,000 but less than \$100,000
- \$100,000 but less than \$150,000
- \$150,000 but less than \$200,000
- \$200,000 but less than \$1,000,000
- \$1,000,000 or more

The Paperwork Reduction Act requires that the IRS display an OMB control number on all public information requests. The OMB Control Number for this study is 1545-1349. Also, if you have any comments regarding the time estimates associated with this study or suggestions on making this process simpler, please write to the, Internal Revenue Service, Tax Products Coordinating Committee, SE:W:CAR:MP:T:T:SP, 1111 Constitution Ave. NW, Washington, DC 20224.