

**IRS – Wage and Investment (W&I)  
SPEC Focus Groups  
Screener Guide – October 2008**

- Miami, FL (2)**
- Kansas City, MO (2)**
- Great Falls, MO (2)**
- Boston, MA (2)**

**PHONE BASED RECRUITING FROM CONTACT LIST: Participant name, gender, address with zip code, telephone number. LIMIT TO ONE MEMBER PER FAMILY**

Hello, my name is \_\_\_\_\_ and I work for \_\_\_\_\_. A few weeks ago, you expressed interest in participating in a group discussion about IRS services. We are a marketing research company that is working with the IRS to help them understand how we can better meet your tax information needs.

We are offering \$75 cash for each person’s participation and will also be serving food at the event.

Your identity will not be shared with the IRS or other agency, nor will we be discussing your specific tax issues. Any lists with your name will be shredded after this project is completed. 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. Assuming you meet the qualifications, would you be available to come to the discussion location on (DATE) at (LOCATION) and (TIME - **specify at least 15 minutes prior**)?

- Yes
- No *[Thank you and terminate interview]*

I have a few questions to help us get a mix of people for this session.

2. Who prepares your taxes? Did you use the services of a paid preparer, such as H&R Block or a certified public accountant, to file your tax returns this year?

- Myself.....1
- Friend/relative..... 2
- Free assistance from local organizations.....3
- Paid preparer .....4
- No one/I don’t prepare taxes.....5

3. Do you earn *[Read list]*:

- Less than \$25,000.....1
- \$25,001 to \$35,000.....2
- \$35,001 to \$50,000.....3 *[Thank you and terminate interview]*
- Over \$50,000.....4 *[Thank you and terminate interview]*

4. Record Gender

- Male.....1
- Female.....2
- [Recruit for 50/50 split]*

Do you have any questions about this group or about how to get to our facility? *[Provide directions and public transportation information if requested]*. We would 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 name from list and best phone number:]*

Name \_\_\_\_\_  
Phone number \_\_\_\_\_

Again, you'll be receiving \$75 that is taxable and reportable on your 2005 federal income tax return.

The Paperwork Reduction Act required that IRS provide an OMB Control Number on all approved public information requests. That number is OMB 1545-1349. 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.

*[Provide the following information only if respondent asks for address:]*

Send your comments and suggestions to:  
Internal Revenue Service  
Tax Products Coordinating Committee  
Room #IR-6406  
1111 Constitution Avenue, NW  
Washington, DC 20224

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