

Appendix B

FSRP: Eligibility/Refusal/Intake Survey 2009

Date:

1) Please Enter the Customer Access Number (CAN):

2) (Screener: Answer by observation/judgment)

Should the Taxpayer be capable of using Facilitated Self Assistance?

Select an answer (Selecting No will jump to the end of the survey)

Yes

No - Taxpayer lacks English Skills

No - Taxpayer would require Adaptive Computer Equipment

3) "Welcome to the IRS, how can we assist you today?"

(Screener: Determine if **all** taxpayer's tasks are FSRP eligible)

Are **all** the purposes of the customer's visit listed below?

File/prepare my taxes

Find out about my refund

Get a blank tax form for current or prior year

Find help with Earned Income Tax Credit (EIC)

Set up a payment agreement

Get an answer to a tax law question

Get an Employee Identification Number

Economic Stimulus Payment/rebate

E-File Locator Service

Use EFTPS to make a payment

Select an answer (Selecting No will jump to the end of the survey)

Yes No

Screening for e-mail address (for Free Filing))

4) If taxpayer needs to file/prepare taxes (**use Free File**) then say,
"Do you have an e-mail account?"

Select an answer (mark one)

Taxpayer is not here to file/use Free-File

Taxpayer has e-mail

Taxpayer does not have e-mail (will jump to the end of the survey)

5) (Screener: Does taxpayer have what they need to complete all tasks using FSRP?)

Select an answer (Selecting No will jump to the end of the survey)

Yes No

2-1) (Screener: Select the **main** reason for the customer's visit. If there are multiple FSRP eligible tasks, please select the task that will take the longest amount of time.)

Select **main** reason:

File/prepare my taxes

Find out about my refund

Get a blank tax form for current or prior year

Find help with Earned Income Tax Credit (EIC)

Set up a payment agreement

Get an answer to a tax law question

Get an Employee Identification Number

Economic Stimulus Payment/rebate

E-File Locator Service

Use EFTPS to make a payment

2-2) "The IRS is conducting a study on a new service option at this office. Because your service qualifies, you are eligible to participate. If you choose to participate instead of waiting for face-to-face service, an IRS employee will guide you in helping yourself to services available on the IRS website.

Would you like to participate?"

Select an answer (Selecting Yes will jump to the Intake Survey Invitation)

Yes No

Refusal Survey Invitation

2-3) "Before I get you set-up with an assistor, would you be willing to answer a few questions so we can better understand why taxpayers may **not** want to try our new service option?"

“Your participation will be helpful, and all of your answers will be kept anonymous and Privacy. The survey will take about two minutes to complete. Are you ready to begin?”

Select an answer (Selecting No will jump to the end of the survey)

Yes No

Refusal Survey Questions (7 questions)

2-4) “What is your **main** reason for **not** participating?” (*Screener: Read list if needed, mark one*)

- Not familiar with the Internet or using a computer
- Already tried the website before coming to the IRS office for assistance
- Only feel comfortable getting information from a live person
- Trouble seeing information on computer screens/needs adaptive technology
- Don't feel like it/don't want to take time today
- Don't know/refuse to answer

2-5) “Where do you **usually** access the Internet?” (*Screener: Read list if needed, mark one*)

- From home or work
- School
- Library or other public place
- Cell phone
- Other (Please type answer in the box below)
- No Internet access
- Don't know/refuse to answer

2-6) “What options are you aware of, besides the service we provide in this office, for getting help from the IRS?” (*Screener: Read list if needed, mark all that apply*)

- Telephone
- IRS.gov
- Volunteer sites
- Other (Please specify) _____
- Don't know/refuse to answer

2-7) “Please tell me your zip code:” (*Screener: Enter zip code or select don't know/refuse*)

Don't know/refuse to answer

2-8) "Please show me your Total Household Income range." (Screener: Show card to taxpayer and enter selection)

- A) Less than \$5,000
- B) \$5,000 - \$15,000
- C) \$15,001 - \$25,000
- D) \$25,001 - \$35,000
- E) \$35,001 - \$45,000
- F) \$45,001 - \$55,000
- G) \$55,001 - \$70,000
- H) \$70,001 - \$85,000
- I) \$85,001 - \$100,000
- J) \$100,001 - \$115,000
- K) \$115,001 - \$130,000
- L) \$ More than \$130,000
- M) Don't know/refuse to answer

2-9) "Please show me your age range:" (Screener: Show card to taxpayer and enter selection)

- A) Under 20
- B) 20 - 24
- C) 25 - 29
- D) 30 - 34
- E) 35 - 39
- F) 40 - 44
- G) 45 - 49
- H) 50 - 54
- I) 55 - 59
- J) 60 - 64
- K) 65 or over
- L) Don't know/refuse to answer

2-10) (Screener: Answer by observation/judgment)

What gender is the taxpayer? (After making a selection, the screen will jump to the end of the survey)

Select an answer

- Male
- Female
- Couple
- Unclear

“Thank you for your time and effort, we appreciate it. Your input will help us improve our service to taxpayers.”

End of Refusal Survey

*(End of Refusal Survey. Please click the **Submit** button.)*

Intake Survey Invitation

2-11) “We’re trying to find out more about the taxpayers who use our services to help us better meet your needs. Before I get you to a computer would you be willing to answer a few questions? Your participation will be helpful, and all of your answers will be kept anonymous and private. The survey will take about one minutes to complete. Are you ready to begin?”

Select an answer

Yes (If Yes is selected, proceed to screen 2-13.)

No (If No is selected, skip to screen 2-17)

Intake Survey Questions (4 questions)

2-12) “Please tell me your zip code:” *(Screener: Enter zip code or select don’t know)*

Don’t know/refuse to answer

2-13) “Please show me your Total Household Income range.” *(Screener: Show card to taxpayer and enter selection)*

- A) Less than \$5,000
- B) \$5,000 - \$15,000
- C) \$15,001 - \$25,000
- D) \$25,001 - \$35,000

- E) \$35,001 - \$45,000
 - F) \$45,001 - \$55,000
 - G) \$55,001 - \$70,000
 - H) \$70,001 - \$85,000
 - I) \$85,001 - \$100,000
 - J) \$100,001 - \$115,000
 - K) \$115,001 - \$130,000
 - L) \$ More than \$130,000
 - M) Don't know/refuse to answer
-

2-14) "Please show me your age range:" (Screener: Show card to taxpayer and enter selection)

- A) Under 20
 - B) 20 - 24
 - C) 25 - 29
 - D) 30 - 34
 - E) 35 - 39
 - F) 40 - 44
 - G) 45 - 49
 - H) 50 - 54
 - I) 55 - 59
 - J) 60 - 64
 - K) 65 or over
 - L) Don't know/refuse to answer
-

2-15) (Screener: Answer by observation/judgment)

What gender is the taxpayer? (After making a selection, the screen will jump to the end of the survey)

- Male
 - Female
 - Couple
 - Unclear
-

End of Survey. (*If taxpayer is ineligible for FSRP or chooses not to participate, taxpayer is directed to regular TAC service*)

Closing Script for Participants

2-16) “Thank you for your participation in our study, we appreciate it. Your input will help us improve our service to taxpayers.”

“After you complete your task using IRS.gov, please log off the computer by clicking the X in the top right hand corner of the screen. At that time, you will see an exit survey. Please take a few minutes to complete the brief survey, so that we can better improve our services in the future. Your effort is greatly appreciated.”

*(End of Survey. Screener: Please click the **Submit** button.)*

Appendix C

Language for placard at computer terminals:

“The actions you perform on this computer are being recorded for quality assurance purposes. Privacy and anonymity will be maintained. Your personal information will not be captured or retained.”

Appendix D

IRS Service Study Questionnaire:

Instructions: For each question below, please answer for the MAIN issue that brought you here today. The survey will take about 3 minutes.

Exit_1) What was your **MAIN** reason for visiting this IRS office today?

- File/prepare my taxes
- Find out about my refund
- Get a blank tax form for current or prior year
- Find help with Earned Income Tax Credit (EIC)
- Set up a payment agreement
- Get an answer to a tax law question
- Get an Employee Identification Number
- Economic Stimulus Payment/rebate
- E-File Locator Service
- Use EFTPS to make a payment

Exit_2) **Before today**, which of the following **IRS resources** or services did you use to attempt to resolve this issue? (Check all that apply)

- Previous visit to an IRS office
- Called the IRS
- Used IRS website on the Internet
- Written correspondence with the IRS (other than e-mail)
- E-mailed the IRS
- Volunteer organization or tax clinic
- None
- Don't know/Refuse to answer

Exit_3) How easy or difficult was it to find the information or conduct the transaction you needed?

- Very Easy
- Somewhat Easy
- Neutral
- Somewhat Difficult
- Very Difficult
- Don't know/refuse to answer

Exit_4) Were you able to get an answer to your question or complete your transaction using the IRS website?

YES → *[Skip to Exit_6]*

NO

Don't know/refuse to answer

Exit_5) If you were unable to get the service you needed on the IRS website, what was the **MAIN** reason? (Please check one)

Could not find the information I needed

Did not understand the information I received

I needed further clarification or assistance

I was not able to use the website

I became frustrated with the process

Other (Please type your answer in the box below)

Don't know/refuse to answer

Exit_6) Do you plan to seek further assistance from the **IRS** about the **MAIN** issue that brought you here today?

YES

NO → *[Skip to Exit_9]*

Don't know/refuse to answer

Exit_7) What is the **MAIN** reason you plan to seek further assistance from the **IRS** about this issue? (Maximum 256 characters)

Exit_8) How do you plan to seek further assistance **from the IRS**? (Please check one)

Telephone the IRS

IRS.gov

Return to this or another IRS office (Taxpayer Assistance Center)

Write a letter to the IRS

Other (Please type your answer in the box below)

Don't know/refuse to answer

Exit_9) In the future, would you consider using the IRS website (IRS.gov) for any of the following services? (Check all that apply)

File/prepare my taxes

Find out about my refund

Get a blank tax form for current or prior year

Find help with Earned Income Tax Credit (EIC)

Set up a payment agreement

Get an answer to a tax law question

Get an Employee Identification Number

Economic Stimulus Payment/rebate

E-File Locator Service
Use EFTPS to make a payment

Exit_10) How satisfied or dissatisfied are you with the service you received today?

Very Satisfied
Satisfied
Neutral
Dissatisfied
Very Dissatisfied
Don't know/refuse to answer

Exit_11) Where do you **usually** access the Internet? (Please check one)

Home or work
School
Library or other public place
Cell phone
Other
No Internet access
Don't know/refuse to answer

Exit_12) Do you have any additional comments? Please let us know how we can improve your experience. Please enter comments/suggestions in box. (Maximum 256 characters)

Thank you for participating in our new service option study! Your input will help us to make taxes easier.

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*