



2009 e-Strategy Constituent Research

COVER PAGE FOR 1040 C E F Filers

C=Profit Or Loss From Business; E=Profit/Loss From Rents & Royalties; F=Profit/Loss From Farming

RESPONDENT INFO

RESPONDENT ID# _____ (1-5)
SAMPLE SIZE...

TOTAL 1040 SCHEDULE "C" FILERS (n=1000) SELF-FILERS WHO ARE LIKELY TARGET.....1 ...109
TOTAL 1040 SCHEDULE "E" FILERS (n=250) SELF-FILERS WHO ARE LIKELY TARGET.....2
TOTAL 1040 SCHEDULE "F" FILERS (n=250) SELF-FILERS WHO ARE LIKELY TARGET.....3

APPENDS: Bal-Due (**ALL WILL BE Bal-Dues**).....1 ...110
Age/Year Of Birth (**ALL WILL BE Under 65**).....2
Filing Status (**TBD IF ALL WILL BE "Other Than Single" AS THAT MAY NOT APPLY TO THIS CELL**) 3
Math Error Code (**TBD, BUT ALL MAY HAVE Had Math Error(s) In Return**).....4
AGI (For Analysis Only. Organize Into Typical IRS Income Ranges).....5
Filing Method (For Analysis Only. Electronic vs. Paper vs. V-Code).....6
Call-In vs. Walk-In (**If Available**, Whether Called For Info/Assistance Or Walked Into IRS Center)7
Return Complexity Level (For Analysis Only. **TBD**, But With Schedule Attachments, All Could Be Complex) 8
NOTE THAT APPENDS IN THIS CELL DO NOT INCLUDE FREE FILE, EITC, OR CTC NO 111

**BOLD RED =
IRS LIST
BEING
PULLED TO
REACH BEST
POTENTIAL
TARGET FOR
NEW SVCS.**

CITY _____ ST _____ ZIP _____ ST CODE _____

REGION: Area #1.....1 Area #2.....2 Area #3.....3 Area #4.....4 Area #5.....5 ...112

PHONE # (AC-_____) _____

DO NOT ALTERNATE ASKING FOR MALE AND FEMALE GENDER AS nth SELECTION SAMPLING WILL RESULT IN A SAMPLE REPRESENTATIVE OF NATURAL GENDER BREAKS IN LISTS PROVIDED BY IRS.

RECORD DATE, TIME & DISPOSITION FOR EACH ATTEMPT ON THIS PERSON

		Disc	NA	Unavail	Ref	NQ	Comp
1	DATE: _____ TIME: _____ (am) (pm)	1	2	3	4	5	6
2	DATE: _____ TIME: _____ (am) (pm)	1	2	3	4	5	6
3	DATE: _____ TIME: _____ (am) (pm)	1	2	3	4	5	6
4	DATE: _____ TIME: _____ (am) (pm)	1	2	3	4	5	6
5	DATE: _____ TIME: _____ (am) (pm)	1	2	3	4	5	6
6	DATE: _____ TIME: _____ (am) (pm)	1	2	3	4	5	6
7	DATE: _____ TIME: _____ (am) (pm)	1	2	3	4	5	6
8	DATE: _____ TIME: _____ (am) (pm)	1	2	3	4	5	6
9	DATE: _____ TIME: _____ (am) (pm)	1	2	3	4	5	6
10	DATE: _____ TIME: _____ (am) (pm)	1	2	3	4	5	6

INTERVIEWER _____

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 survey Taxpayers and get feedback on IRS services. Your participation in this survey is entirely voluntary and your responses to all questions will be kept in the strictest confidence by Russell Research and never identified with you personally to the IRS or anyone else in Government. The survey should take no more than 15 minutes to complete and we'd appreciate your participation. Would you be willing to help with the survey?

>> IF "YES", READ: **Thank you. Let's begin the survey.**

>> IF "NO", THANK & RECORD AS "Ref" FOR THIS ATTEMPT IN BOX ABOVE AND OFFER COMMENTS ADDRESS AT END OF SURVEY.



2009 e-Strategy Constituent Research

RESPONDENT INFO

RESPONDENT ID# _____ (1-5)

SAMPLE SIZE...

TOTAL 1040 FILERS (n=1,500) ALL WILL BE SELF-FILERS WHO ARE LIKELY TARGET.....1 ...109

APPENDS: Bal-Due (ALL WILL BE Bal-Dues).....1 ...110

BOLD RED = IRS LIST BEING PULLED TO REACH BEST POTENTIAL TARGET FOR NEW SVCS.

- Age/Year Of Birth (ALL WILL BE Under 65 - ORGANIZE INTO TYPICAL IRS RANGES).....2
Filing Status (ALL WILL BE "Other Than Single" - i.e., NO Singles).....3
Math Error Code (TBD, BUT ALL MAY HAVE Had Math Error(s) In Return).....4
AGI (For Analysis Only. Organize Into Typical IRS Income Ranges).....5
Filing Method (For Analysis Only. Electronic vs. Paper vs. V-Code).....6
Call-In vs. Walk-In (If Available, Whether Called For Info/Assistance Or Walked Into IRS Center)7
Return Complexity Level (ALL WILL BE Complex Filers).....8
Free File Users (For Analysis Only).....1 ...111
Free File Eligible Non-Users (For Analysis Only).....2
Not Free File Eligible (For Analysis Only).....3
Whether An EITC Return Or Not.....4
Whether A CTC/Child Tax Credit Return Or Not.....5

CITY _____ ST _____ ZIP _____ ST CODE _____

REGION: Area #1.....1 Area #2.....2 Area #3.....3 Area #4.....4 Area #5.....5 ...112

PHONE # (AC-____) _____

FIELD: DO NOT ALTERNATE ASKING FOR MALE AND FEMALE GENDER IN THIS CASE AS STANDARD RANDOM nth SELECTION SAMPLING WILL RESULT IN A SAMPLE THAT IS REPRESENTATIVE OF THE NATURAL GENDER BREAKS IN THE LISTS PROVIDED BY IRS.

RECORD DATE, TIME & DISPOSITION FOR EACH ATTEMPT ON THIS PERSON

Table with 7 columns: Disc, NA, Unavail, Ref, NQ, Comp. Rows 1-10 with DATE and TIME fields.

INTERVIEWER _____

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 survey Taxpayers and get feedback on IRS services. Your participation in this survey is entirely voluntary and your responses to all questions will be kept in the strictest confidence by Russell Research and never identified with you personally to the IRS or anyone else in Government. The survey should take no more than 15 minutes to complete and we'd appreciate your participation. Would you be willing to help with the survey?

>> IF "YES", READ: Thank you. Let's begin the survey.

>> IF "NO", THANK & RECORD AS "Ref" FOR THIS ATTEMPT IN BOX ABOVE AND OFFER COMMENTS ADDRESS AT END OF SURVEY.

1. First, for the record, are you male or female? (CIRCLE ANSWER BELOW.)

RUSSELL: MONITOR ALL DISTRIBUTIONS.

- Male.....1 ...00
- Female.....2
- (DON'T OFFER, BUT CIRCLE IF:) Refused & Can't Discern Gender.....y

2. Do you have regular access to the Internet at home, work, or otherwise? (CIRCLE ANSWER.)

- Yes (**CONTINUE WITH REST OF SURVEY**).....1 ...00
- No (**THANK RESPONDENT AND GENTLY TERMINATE SURVEY**).....2

3. Next, have you ever contacted the IRS, or had any interaction with the IRS, in which you were seeking information or assistance with a tax matter? (CIRCLE ANSWER.)

- Yes (ASK Qs 4-5) (**IF CALL-IN/WALK-IN HISTORY NOT APPENDED, TAB AS "HAD IRS CONTACT"**) ...1
- ...00
- No (SKIP TO Q6).....2
- (DON'T OFFER, BUT CIRCLE IF:) Refused/Can't Remember (SKIP TO Q6).....y

4. (IF "YES" TO Q3:) In which of the following ways have you ever contacted the IRS or had interaction with the IRS, in which you were seeking information or assistance about a tax matter? (ROTATE, READ CHOICES & CIRCLE ALL THAT APPLY BELOW.)

- By Telephone.....1 ...00
- By Mail.....2
- By Going To An IRS Tax Assistance Center.....3
- By E-mail.....4
- By Going To The IRS Website - IRS.gov.....5
- (READ LAST:) Some Other Way (SPECIFY).....x
- (DON'T READ, BUT CIRCLE IF:) Can't Recall.....y

NOTE TO IRS: IRS lists may include Appends telling us if respondent had any call-in or walk-in contact in past year, but even if we know that info, we should ask this question anyway to serve as warm-up to survey topics.

5. (IF "YES" TO Q3:) Approximately when did you last contact or interact with the IRS seeking information or assistance with a tax matter? Was it...(READ CHOICES IN ORDER & CIRCLE ANSWER.)

- Within The Past Year (**TAB OUT AS "HAD RECENT/PAST-YEAR IRS CONTACT"**).....1 ...00
- One To Two Years Ago.....2
- Or, More Than Two Years Ago.....3
- (DON'T READ, BUT CIRCLE IF:) Can't Recall When It Was.....y

ASK ALL:

6. I'm going to read a list of possible reasons a Taxpayer might contact the IRS. As I read this list, please stop me if I mention something that you have had a question about in the past, where you wished you could have easily contacted the IRS for more information or assistance. (ROTATE, READ LIST & CIRCLE ALL THAT APPLY.)

- How To Get A Specific Tax Form That You Need.....1 ...00
- Order A Copy Of A Prior-Year Return.....2
- Status Of Your Expected Refund (INCLUDED IN LIST TO SAVE LATER COD).....3
- Your Balance-Due Or Money Owed On Taxes.....4
- Arrange Payment Options.....5
- Tax Law.....6
- How To File Your Individual Tax Return.....7
- How New Legislation Affects You - e.g., The Stimulus Bill Or Some Other Tax Issue In The News 8
- Questions About A Notice Or Letter You Received From The IRS.....9
- Questions About The Status Of An Unresolved Tax Issue With The IRS.....0
- Request For An EIN Or Employer Identification Number.....1 ...00
- Special Topics Such As Tax Credits/Deductions, the AMT, Pensions, Sale Of Home, etc. 2

NOTE: This is a compressed list of top reasons for Call-In and Walk-In contact with IRS. Asking this will give us a sense of top info/assistance needs among target pops (especially if we can't identify their past contact).

(LAST:) Is There Anything Else I Left Out? (SPECIFY) _____ 0
(IF NOTHING MENTIONED, ASK:) Or Have You Never Wanted To Contact IRS About Anything?

Y

7. **Let’s talk about the role that the Internet and electronic products/services play in your life. First, which if any of the following electronic products or services do you have daily access to? (START AT PRE-CHECK, READ ALL BOXED CHOICES & CIRCLE ANSWER BELOW.)**

NOTE TO IRS:
Qs 7 & 8 provide setup for the later e-interaction questions and concept reaction and would be used to profile the sample in terms of electronic sophistication.

- A Basic Cell Phone Without Text Messaging Or Internet Browsing Capability00 1
- A Cell Phone With Text Messaging Or Internet Browsing Capability.....2
- A Landline Or Regular, Non-Cell Telephone.....3
- A Computer - Desktop Or Laptop.....4
- A Smart Phone Such As A Palm, Blackberry, etc.....5
- Internet Access Using A Dial-Up Connection.....6
- Internet Access Using A High-Speed, DSL or Cable Modem Connection7
- E-mail Through A Personal E-mail Account.....8
- E-mail Through A Business E-mail Account.....9
- (DON'T READ, BUT CIRCLE IF:) None Of The Above.....y

8. **Thinking of the Internet specifically, which if any of these types of Internet activities do you participate in on a regular basis? (START AT PRE-CHECK, READ CHOICES & CIRCLE ANSWER BELOW.)**

- Using Search Engines (Google, Bing, etc.) To Research Topics/Interests.....1 ...00
- Blogging And Social Networking - e.g., Twitter, MySpace, Facebook, LinkedIn, etc. 2
- Online Shopping, Purchases Or Emailing With Retailers.....3
- Online Banking, Bill-Pay Or Emailing With Banks & Financial Institutions.....4
- Online Bill-Pay Or Emailing With Other Businesses - e.g., Credit Card Or Utilities Companies 5
- Doing Online Financial Investing And Emailing With Investment Companies.....6
- Transactions Or Emailing With Governments For Auto Registrations, Taxes, etc.....7
- Scheduling Appointments With Doctors/Dentists/Other Professionals.....8
- Scheduling Or Responding To Social Events - Parties, Organizations, etc.....9
- Making Travel, Hotel Or Other Reservations.....0
- (DON'T READ, BUT CIRCLE IF:) None Of The Above.....y

9. **Next, have you ever had any direct contact with or interaction with the IRS through the Internet? (CIRCLE ANSWER BELOW.)**

- Yes (ASK Q10).....1 ...00
- No (SKIP TO Q11).....2
- (DON'T OFFER, BUT CIRCLE IF:) Can't Recall (SKIP TO Q11).....y

10. (IF "YES" ABOVE:) **What types of Internet contact or interaction with the IRS have you had? (DO NOT READ CHOICES - JUST CIRCLE ALL THAT APPLY BELOW.)**

- All Mentions Of Going To/Activity At The IRS Website - IRS.gov.....1 ...00
- All Mentions Of Going To/Activity At Other, Non-IRS, Websites.....2
- All Other Mentions (SPECIFY)_____x
- Can't Recall.....y

11. (ASK ALL:) **Although you may have mentioned this, please tell me if you have ever been to the IRS’s website, IRS.gov, for tax information or assistance. (CIRCLE ANSWER BELOW.)**

- Yes (ASK Q12).....1 ...00
- No (SKIP TO Q14).....2
- (DON'T OFFER, BUT CIRCLE IF:) Can't Recall (SKIP TO Q14).....y

12. (IF "YES" ABOVE, ASK:) **Did you find what you were looking for? (CIRCLE ANSWER.)**

- Yes (SKIP TO Q14).....4 ...00
- No (ASK Q13).....3
- (DON'T READ, BUT CIRCLE IF:) Can't Recall (SKIP TO Q14).....y

13. (IF "NO" TO Q12:) **What were you looking for that you could not find? (ENTER VERBATIM RESPONSE AND PROBE FOR FULL UNDERSTANDING OF EACH MENTION.)**

In the Concept Evaluation section of the survey that follows, all respondents will evaluate ALL of the concepts for new IRS electronic services. To avoid respondent wear-out, we have made these questions flow as quickly as possible.

READ: I'm going to describe some possible new electronic services for Taxpayers which could be available in the future from the IRS. After I describe each service, I'll have a few questions about it. Let's start with... (ROTATE CONCEPTS TO AVOID ORDER BIAS. READ RED-HIGHLIGHTED NAME OF CONCEPT AND ITS DESCRIPTION IN A DELIBERATE AND CLEAR VOICE, PAUSING AFTERWARD TO ALLOW ABSORPTION BEFORE STARTING FOLLOWUP QUESTIONS. READ CONCEPTS VERBATIM AND IF ASKED TO EXPLAIN ANYTHING, SAY "I can only tell you what is in the description." AFTER EACH CONCEPT, SEGUE TO NEXT WITH "Thanks. Let's go to the next description".)

☐ **IRS ACCOUNT INFORMATION & UPDATE SERVICE**

This new secure electronic service would be available at IRS.gov. It may allow you to view and print the status of your current tax account and any other information that the IRS has about you for the past three years, and to update your personal account information.

14. **How likely are you to ever use the electronic service I just described? Do you think you...**(READ CHOICES & CIRCLE ANSWER.)

- Definitely Would Use It (ASK Qs 15 & 16 NEXT).....5 ...00
- Probably Would Use It (ASK Qs 15 & 16 NEXT).....4
- Might Or Might Not Use It (IF "DON'T KNOW, CIRCLE HERE TOO) (ASK Qs 15 & 16 NEXT) 3
- Probably Would Not Use It (SKIP TO Q17 NEXT).....2
- Or, Definitely Would Not Use It (SKIP TO Q17 NEXT).....1

15. (IF "DEF/PROB/MIGHT" TO Q14, ASK:) **Think about your level of need for a service like this and then estimate the number of times a year, on average, that you might use it.** (ENTER #.)

(#TIMES/YEAR WOULD USE - IF LESS THAN "1", ENTER VERBATIM:) _____ ...00-00

16. (IF "DEF/PROB/MIGHT" TO Q14, ASK:) **What would be the specific benefits to you of using this electronic service?** (THIS IS A VOLUNTARY-RESPONSE QUESTION BUT WITH A PRE-LIST OF POSSIBLE RESPONSES. DO NOT READ THE CHOICES IN THE LIST, BUT CIRCLE IF ANY VOLUNTARY RESPONSE IS ALREADY PRE-LISTED. MANY RESPONSES WILL NOT BE PRE-LISTED, SO ENTER VERBATIM IN SPACES PROVIDED.)

- It Would Be Convenient.....1 _____ ...00-00
- Would Get Faster Resolution Of Tax Issues 2 _____
-
- Would Get A Faster Response From IRS.3 _____
- Gives Me More Control Of My Tax Situation 4 _____
- It Would Save Me Time.....5 _____
- It's Free/Wouldn't Have To Pay Anyone. 6 _____

17. (IF "PROB/DEF NOT USE" TO Q14, ASK:) **Are there any particular reasons why you would not use this electronic service?** (ENTER VERBATIM RESPONSE & PROBE FULLY TO UNDERSTAND ALL REASONS.)

PROBE FULLY: _____

TAX RETURN HISTORY SERVICE

This new secure electronic service would be available via IRS.gov. This service may allow you to order, for a limited fee, a photocopy of your tax return for any of the last six years.

18. How likely are you to ever use the electronic service I just described? Do you think you...(READ CHOICES & CIRCLE ANSWER.)

- Definitely Would Use It (ASK Qs 19 & 20 NEXT).....5 ...00
- Probably Would Use It (ASK Qs 19 & 20 NEXT).....4
- Might Or Might Not Use It (IF "DON'T KNOW, CIRCLE HERE TOO) (ASK Qs 19 & 20 NEXT) 3
- Probably Would Not Use It (SKIP TO Q21 NEXT).....2
- Or, Definitely Would Not Use It (SKIP TO Q21 NEXT).....1

19. (IF "DEF/PROB/MIGHT" TO Q18, ASK:) Think about your level of need for a service like this and then estimate the number of times a year, on average, that you might use it. (ENTER #.)

(#TIMES/YEAR WOULD USE - IF LESS THAN "1", ENTER VERBATIM:) _____ ...00-00

20. (IF "DEF/PROB/MIGHT" TO Q18, ASK:) What would be the specific benefits to you of using this electronic service? (THIS IS A VOLUNTARY-RESPONSE QUESTION BUT WITH A PRE-LIST OF POSSIBLE RESPONSES. DO NOT READ THE CHOICES IN THE LIST, BUT CIRCLE IF ANY VOLUNTARY RESPONSE IS ALREADY PRE-LISTED. MANY RESPONSES WILL NOT BE PRE-LISTED, SO ENTER VERBATIM IN SPACES PROVIDED.)

- It Would Be Convenient.....1 _____ ...00-00
- Would Get Faster Resolution Of Tax Issues 2 _____
-
- Would Get A Faster Response From IRS.3 _____
- Gives Me More Control Of My Tax Situation 4 _____
- It Would Save Me Time.....5 _____

21. (IF "PROB/DEF NOT USE" TO Q18, ASK:) Are there any particular reasons why you would not use this electronic service? (ENTER VERBATIM RESPONSE & PROBE FULLY TO UNDERSTAND ALL REASONS.)

PROBE FULLY: _____

PAYMENT HISTORY, ARRANGEMENTS & BALANCE DUE SERVICE

This new secure electronic service would be available via IRS.gov. It may allow you to view your tax payment history for the last six years and any payment arrangements you have made with the IRS, and to view your current tax balance due amount.

22. **How likely are you to ever use the electronic service I just described? Do you think you...**(READ CHOICES & CIRCLE ANSWER.)

- Definitely Would Use It (ASK Qs 23 & 24 NEXT).....5 ...00
- Probably Would Use It (ASK Qs 23 & 24 NEXT).....4
- Might Or Might Not Use It (IF "DON'T KNOW, CIRCLE HERE TOO) (ASK Qs 23 & 24 NEXT) 3
- Probably Would Not Use It (SKIP TO Q25 NEXT).....2
- Or, Definitely Would Not Use It (SKIP TO Q25 NEXT).....1

23. (IF "DEF/PROB/MIGHT" TO Q22, ASK:) **Think about your level of need for a service like this and then estimate the number of times a year, on average, that you might use it.** (ENTER #.)

(#TIMES/YEAR WOULD USE - IF LESS THAN "1", ENTER VERBATIM:) _____ ...00-00

24. (IF "DEF/PROB/MIGHT" TO Q22, ASK:) **What would be the specific benefits to you of using this electronic service?** (THIS IS A VOLUNTARY-RESPONSE QUESTION BUT WITH A PRE-LIST OF POSSIBLE RESPONSES. DO NOT READ THE CHOICES IN THE LIST, BUT CIRCLE IF ANY VOLUNTARY RESPONSE IS ALREADY PRE-LISTED. MANY RESPONSES WILL NOT BE PRE-LISTED, SO ENTER VERBATIM IN SPACES PROVIDED.)

- It Would Be Convenient.....1 _____ ...00-00
- Would Get Faster Resolution Of Tax Issues...2 _____
- Would Get A Faster Response From IRS.....3 _____
- Gives Me More Control Of My Tax Situation. .4 _____
- It Would Save Me Time.....5 _____
- It's Free/Wouldn't Have To Pay Anyone.....6 _____

25. (IF "PROB/DEF NOT USE" TO Q22, ASK:) **Are there any particular reasons why you would not use this electronic service?** (ENTER VERBATIM RESPONSE & PROBE FULLY TO UNDERSTAND ALL REASONS.)

PROBE FULLY: _____

AFTER SECURING REACTION TO BASE CONCEPT, ASK Qs 26 (AND 27) AND 28 (AND 29) OF ALL RESPONDENTS:

26. **If this particular service also allowed you to view and calculate penalties and interest that could be charged on balance due accounts, how likely would you be to use it? Do you think you...**(READ CHOICES & CIRCLE ANSWER.)

- Definitely Would Use It.....5 ...00
- Probably Would Use It.....4
- Might Or Might Not Use It.....3
- Probably Would Not Use It.....2
- Or, Definitely Would Not Use It.....1

27. (IF "DEF/PROB/MIGHT" TO Q26, ASK:) **About how many times a year, average, would you use it?** (ENTER # - IF LESS THAN "1", ENTER VERBATIM:) _____ ...00-00

28. **And if this particular service also allowed you to view any tax payoff amounts and make arrangements for payment, how likely would you be to use it? Do you think you...**(READ CHOICES & CIRCLE ANSWER.)

- Definitely Would Use It.....5 ...00
- Probably Would Use It.....4
- Might Or Might Not Use It.....3
- Probably Would Not Use It.....2
- Or, Definitely Would Not Use It.....1

29. (IF "DEF/PROB/MIGHT" TO Q28, ASK:) **About how many times a year, average, would you use it?** (ENTER # - IF LESS THAN "1", ENTER VERBATIM:) _____ ...00-00

IRS APPOINTMENT SCHEDULING SERVICE

This new electronic service would be available through IRS.gov. You could schedule telephone and office appointments with IRS personnel and make any necessary changes in appointments - all through the IRS.gov website.

30. How likely are you to ever use the electronic service I just described? Do you think you...(READ CHOICES & CIRCLE ANSWER.)

- Definitely Would Use It (ASK Qs 31 & 32 NEXT).....5 ...00
- Probably Would Use It (ASK Qs 31 & 32 NEXT).....4
- Might Or Might Not Use It (IF "DON'T KNOW, CIRCLE HERE TOO) (ASK Qs 31 & 32 NEXT) 3
- Probably Would Not Use It (SKIP TO Q33 NEXT).....2
- Or, Definitely Would Not Use It (SKIP TO Q33 NEXT).....1

31. (IF "DEF/PROB/MIGHT" TO Q30, ASK:) Think about your level of need for a service like this and then estimate the number of times a year, on average, that you might use it. (ENTER #.)

(#TIMES/YEAR WOULD USE - IF LESS THAN "1", ENTER VERBATIM:) _____ ...00-00

32. (IF "DEF/PROB/MIGHT" TO Q30, ASK:) What would be the specific benefits to you of using this electronic service? (THIS IS A VOLUNTARY-RESPONSE QUESTION BUT WITH A PRE-LIST OF POSSIBLE RESPONSES. DO NOT READ THE CHOICES IN THE LIST, BUT CIRCLE IF ANY VOLUNTARY RESPONSE IS ALREADY PRE-LISTED. MANY RESPONSES WILL NOT BE PRE-LISTED, SO ENTER VERBATIM IN SPACES PROVIDED.)

- It Would Be Convenient.....1 _____ ...00-00
- Would Get Faster Resolution Of Tax Issues 2 _____
-
- Would Get A Faster Response From IRS.3 _____
- Gives Me More Control Of My Tax Situation 4 _____
- It Would Save Me Time.....5 _____
- It's Free/Wouldn't Have To Pay Anyone. 6 _____

33. (IF "PROB/DEF NOT USE" TO Q30, ASK:) Are there any particular reasons why you would not use this electronic service? (ENTER VERBATIM RESPONSE & PROBE FULLY TO UNDERSTAND ALL REASONS.)

PROBE FULLY: _____

ELECTRONIC NOTICES SERVICE

This new free electronic service would be available by e-mail with IRS.gov. After registering for e-mailed notices, you would receive any IRS notices related to balances due, math errors, etc. by e-mail instead of having them mailed to you by regular mail.

34. How likely are you to ever use the electronic service I just described? Do you think you...(READ CHOICES & CIRCLE ANSWER.)

- Definitely Would Use It (ASK Qs 35 & 36 NEXT).....5 ...00
- Probably Would Use It (ASK Qs 35 & 36 NEXT).....4
- Might Or Might Not Use It (IF "DON'T KNOW, CIRCLE HERE TOO) (ASK Qs 35 & 36 NEXT) 3
- Probably Would Not Use It (SKIP TO Q37 NEXT).....2
- Or, Definitely Would Not Use It (SKIP TO Q37 NEXT).....1

35. (IF "DEF/PROB/MIGHT" TO Q34, ASK:) Think about your level of need for a service like this and then estimate the number of times a year, on average, that you might use it. (ENTER #.)

(#TIMES/YEAR WOULD USE - IF LESS THAN "1", ENTER VERBATIM:) _____ ...00-00

36. (IF "DEF/PROB/MIGHT" TO Q34, ASK:) What would be the specific benefits to you of using this electronic service? (THIS IS A VOLUNTARY-RESPONSE QUESTION BUT WITH A PRE-LIST OF POSSIBLE RESPONSES. DO NOT READ THE CHOICES IN THE LIST, BUT CIRCLE IF ANY VOLUNTARY RESPONSE IS ALREADY PRE-LISTED. MANY RESPONSES WILL NOT BE PRE-LISTED, SO ENTER VERBATIM IN SPACES PROVIDED.)

- It Would Be Convenient.....1 _____ ...00-00
- Would Get Faster Resolution Of Tax Issues 2 _____
-
- Would Get A Faster Response From IRS.3 _____
- Gives Me More Control Of My Tax Situation 4 _____
- It Would Save Me Time.....5 _____
- It's Free/Wouldn't Have To Pay Anyone. 6 _____

37. (IF "PROB/DEF NOT USE" TO Q34, ASK:) Are there any particular reasons why you would not use this electronic service? (ENTER VERBATIM RESPONSE & PROBE FULLY TO UNDERSTAND ALL REASONS.)

PROBE FULLY: _____

38. Aside from the IRS electronic services that we've just talked about, are there any other types of electronic communication, interaction, or services that you would like to see the IRS offer? If so, please describe these in detail so we can give the IRS a clear picture of what Taxpayers want and need. (ENTER EACH SUGGESTION VERBATIM AND PROBE DEEPLY TO ASSURE THAT WE FULLY UNDERSTAND THE SUGGESTED COMMUNICATION OR SERVICE.)

(SUGGESTION) _____ NOTE: This question is designed to get Taxpayers to suggest other electronic services – beyond those concept-tested. _____ ...00

(PROBE) _____

(SUGGESTION) _____ ...00

(PROBE) _____

(SUGGESTION) _____ ...00

(PROBE) _____

39. We've talked about possible new electronic services from the IRS and about Taxpayers such as yourself contacting or interacting with the IRS electronically. Please take a moment to think about it and then tell me any concerns you might have about contacting or interacting electronically with the IRS. Please be as open and frank about this as possible, as your responses are strictly Anonymity and will help the IRS take Taxpayer concerns into account as it designs electronic services. (INTERVIEWER: ENTER EACH RESPONSE BELOW, VERBATIM, AND PROBE BOTH VERTICALLY & HORIZONTALLY TO SECURE AS THOROUGH AND CLEAR A RESPONSE AS POSSIBLE. WE NEED TO FULLY UNDERSTAND EVERY POINT OF POSSIBLE RESISTANCE TO ELECTRONIC INTERACTION WITH IRS. IF RESPONSE IS "HAVE NO CONCERNS", THEN ENTER THAT CLEARLY BELOW, BUT NOT UNTIL YOU HAVE PROBED THOROUGHLY.)

CONCERN **PROBE ON THIS CONCERN**

_____ — _____ ...00
_____ — NOTE: This question gives respondents an opportunity to express any concerns, related to interaction with IRS, which may be driving rejection of the new service concepts. _____ ...00
_____ — _____ ...00
_____ — _____ ...00
_____ — _____ ...00

IMPORTANT TEAM NOTE: With no demographic questions other than Gender being asked here, all sub-group and demographic profile analysis will rest on the Appends being provided by the IRS in the list for the survey. Therefore, it is critical that careful decisions be made about which Appends the IRS will provide.

CLOSING COMMENTS
That completes the survey. Thank you so much for your help with the survey. 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 1545-1432. In addition, if you have any comments about the time estimate to complete the survey or ways to improve the survey, you may 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.