Simplification web-based survey

understanding the effectiveness of IRS notices

Internal Revenue Service

August 2, 2011

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Notice	CP 0 (Fornad Income Credit)
Sample Size	CP 9 (Earned Income Credit) Total N=400
Intro Text & Disclaimer	We are conducting a web-based survey for the IRS to determine the effectiveness of its notices. The survey is voluntary, and we will keep information anonymous or private as allowed by law. The survey will only take about 20 minutes to complete. It involves reading and answering questions about two notices; there are XX pages in all.
	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 OMB# 1545-1432 . 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.
Screeners & Demographics	
PN:	Ask everyone; Single response
QS1	What is your gender?
	() Male () Female
PN:	Ask everyone; Single response
QS2	() Under 18 (TERMINATE)
	() 18–29
<u> </u>	() 30–39
	() 40–49 () 50–59
	() 60+
PN:	Ask everyone; Single response
QS3	What is your marital status?
	() Married
<u> </u>	() Single () Divorced/Separated
	() Widowed
PN:	Ask everyone; Single response
QS4	Which of the following categories includes your annual household income?
	() Under \$25,000
	() \$25,000-\$34,999
	() \$35,000-\$49,999
	() \$50,000–\$75,000 () \$100,000–\$149,000
	() \$150,000 or more
	() Prefer not to say
QS5	Are you of Hispanic or Latino origin (ethnicity)?
PN:	() Yes
Ask everyone; Single response	() No
QS6	What is your race? Please select one or more. Are you
PN:	() White
Ask everyone; Single response. Accept all multiple answers.	
<u> </u>	() Asian () Native Hawaiian or other Pacific Islander
	() American Indian or Alaskan Native
PN:	Ask everyone; Single response; drop-down menu
QS7	In which state is your primary residence?
PN:	Aak ayamanay Cinala maananaa
058	Ask everyone; Single response
QS8	Have you paid federal taxes in the past 5 years?
QS8	
	Have you paid federal taxes in the past 5 years? () Yes
QS8 Document review Directions for reading through document	Have you paid federal taxes in the past 5 years? () Yes
Document review Directions for reading through	 Have you paid federal taxes in the past 5 years? () Yes () No (TERMINATE) Read through the document; you must review all the pages, including the worksheet. You can use the thumbnails and arrows at the top to go from page to page. Use the scroll bar on the right to scroll through each page. If you find a section confusing or hard to understand, click on it with your mouse to indicate that it's confusing.
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Document review Directions for reading through	 Have you paid federal taxes in the past 5 years? () Yes () No (TERMINATE) Read through the document; you must review all the pages, including the worksheet. You can use the thumbnails and arrows at the top to go from page to page. Use the scroll bar on the right to scroll through each page. If you find a section confusing or hard to understand, click on it with your mouse to indicate that it's confusing. Once you've read all the pages, you'll be asked a series of questions about what you just read. The participant reads (and clicks) through all pages and is taken to a series of comprehension questions. The participant is able to go back and review the document at any time. If the participant doesn't click on anything, before advancing to the comprehension questions, a reminder will pop up: "Do you want to mark anything as confusing or hard to understand? If you do, you can go back to any page and mark the document. Otherwise, you can continue to the questions." If the participant has marked items, an open-ended question will appear: You marked [X] section(s) as confusing or hard to understand. Describe what was most confusing to you. Ask everyone; Radio buttons; Randomize statements; Anchor IDK & make mutually exclusive Why have you received this notice?

r	
PN:	Ask everyone; Radio buttons; Randomize statements
Q2	What criteria disqualifies you from being eligible for the credit? Mark all that apply:
	(X) If my Social Security card reads "Not Valid for Employment"
	(X) If my Social Security card was issued so I could get federally funded benefits
	(X) If I'm an Earned Income Credit qualifying dependent of another person
	() If I applied for the credit last year
	
PN:	Ask everyone; Radio buttons; Randomize statements; Multi-response
Q3	What action(s) does the notice instruct you to take? Mark all that apply:
	(X) Fill out the worksheet to determine if you qualify for the credit
	(X) If you're eligible for the credit, return the worksheet to the IRS
	 () Fill out the worksheet next year when you complete your taxes () Redo your taxes (file an amended return) to claim the credit
	() Fill out the worksheet next year when you complete your taxes
PN:	Ask everyone; Radio buttons; Randomize statements; Anchor IDK & make mutually exclusive
Q4	What Steps does the worksheet instruct you to take?
	(X) Complete Step 1 to determine if I'm eligible to continue completing the worksheet
	() Complete Steps 1-4
	() Complete Step 1, 2 and 3, and return the worksheet to the IRS
	() I don't know
PN:	Ask everyone; Radio buttons; Randomize statements; Single response
Q5	If you qualify for the credit, but still owe the IRS other taxes or debts, will you receive a refund check?
	() Yes, it should arrive in 6–8 weeks
	(X) Maybe, it depends on the amount of taxes I still owe
	() No
PN:	Ask everyone; Radio buttons; Randomize statements; Single response
Q6	What should you do if you're eligible for the credit?
	(X) Sign and date the worksheet, and mail it to the IRS
	() Write "EIC" on my tax return next year
	() File an amended return
-	() Wait to be contacted by an IRS representative
Q6	What should you do if you're eligible for the credit?
	(X) Sign and date the worksheet, and mail it to the IRS
	() Write "EIC" on my tax return next year
	() File an amended return
	() Wait to be contacted by an IRS representative
Simplicity Index Questions	Ask svenene: Dadie buttens, 1. Er rendemize statemente
PN:	Ask everyone; Radio buttons, 1–5; randomize statements
QDOC2	Looking at this document, please tell us how much you agree or disagree with the following statements, where 5 is "Strongly agree" and 1 is "Strongly disagree"
Clarity	
Clarity	The notice is well organized
	It is easy for me to understand the content and wording in the notice
	The notice is visually clear
	The typeface and type size are easy to read
	The notice helps me understand my situation
Freshness	
	The tone of the notice is better than I expected
	The tone of the notice is respectful
	The notice looks better than I expected
Honesty	
·····	The notice is straightforward
	The notice explains the IRS's decisions and the reasoning behind them
Usefulness	
	The notice helps me understand what actions I can take next
	The notice anticipates my questions
	The notice provides an appropriate level of detail
	The notice provides factual information for me to base my decision on

Inspiration	
	The notice makes me feel that the IRS wants me to be well informed
	The notice makes me feel like I can contact the IRS for help if I need it

Behavioral questions	
PN:	Ask everyone; Radio buttons
QDOC3	To what extent does the presentation and tone of the notice make you more likely to read the entire document?
	() Much more likely
	() Somewhat more likely
	() No difference
	() Somewhat less likely
	() Much less likely
PN:	Ask everyone; Radio buttons; Randomize statements
QDOC4	If you received this notice, what would you do? The more honest you can be about your response, the more it will help us create effective communications. Mark all that apply:
	() Not open it immediately, wait a few days/weeks until I had the time to focus on it
	() Contact an accountant for help
	() Call the IRS
	() Go to the IRS website (www.irs.gov) for help
	() Find an IRS publication for an explanation
	() Find an IRS tax clinic
	() Wait to see if I receive another notice
	() I wouldn't do anything
	() Complete the form and worksheet, and mail it in if I were eligible
	() Other
Preference questions	
PN:	Show wireframe document and allow respondent to click on only 1 document
QDOC5	Click on the document that provided a clearer explanation for what you needed to do.
PN:	Ask everyone; Open ended text box
QDOC6	What is it about this notice that made it clearer?
PN:	Ask everyone; Open ended text box
QDOC7	Is there any other information that was left out, but would have helped you respond? If so, please describe.
Thank you screen	

Notice	CP 276B (FTD filed late/incorrectly)
Sample Size	Total N=400
Intro Text & Disclaimer	We are conducting a web-based survey for the IRS to determine the effectiveness of its notices. The survey is voluntary, and we will keep information anonymous or private as allowed by law. The survey will only take about 20 minutes to complete. It involves reading and answering questions about two notices; there are XX pages in all. The Paperwork Reduction Act requires that the IRS display an OMB control number on all public information requests.
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Screeners & Demographics	
PN:	Ask everyone; Single response
QS1	What is your gender?
	() Male
PN:	() Female Ask everyone; Single response
QS2	() Under 18 (TERMINATE)
	() 18–29
	() 30–39
	() 40-49
	() 50–59 () 60+
PN:	Ask everyone; Single response
QS3	What is your marital status?
	() Married
	() Single
	() Divorced/Separated () Widowed
PN:	Ask everyone; Single response
QS4	Which of the following categories includes your annual household income?
	() Under \$25,000
	() \$25,000-\$34,999
	() \$35,000-\$49,999
	() \$50,000–\$75,000 () \$100,000–\$149,000
	() \$150,000 \$149,000 () \$150,000 or more
	() Prefer not to say
QS5	Are you of Hispanic or Latino origin (ethnicity)?
PN:	() Yes
Ask everyone; Single response	() No
QS6	What is your race? Please select one or more. Are you
PN: Ask everyone; Single response. Accept all multiple answers.	() White
	() Asian
	() Native Hawaiian or other Pacific Islander
	() American Indian or Alaskan Native
PN:	Ask everyone; Single response; drop-down menu
QS7	In which state is your primary residence?
PN:	Ask everyone; Single response
QS8	Have you paid federal taxes in the past 5 years?
	() Yes () No (TERMINATE)
Document review	() No (TERMINATE)
Directions for reading through document	Read through the document; you must review all the pages, including the worksheet. You can use the thumbnails and arrows at the top to go from page to page. Use the scroll bar on the right to scroll through each page.
	If you find a section confusing or hard to understand, click on it with your mouse to indicate that it's confusing.
	Once you've read all the pages, you'll be asked a series of questions about what you just read.
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PN:	If the participant has marked items, an open-ended question will appear:
QDOC1 Comprehension questions	You marked [X] section(s) as confusing or hard to understand. Describe what was most confusing to you.
PN:	Ask everyone; Radio buttons; Randomize statements; Anchor IDK & make mutually exclusive
Q1	Why have you received this notice?
	(X) I filed my Federal Tax Deposit after its due date
	() I haven't filed my Federal Tax Deposit for 2008
	() I filed my Federal Tax Deposit incorrectly
	() I don't know

PN:	Ask everyone; Radio buttons; Randomize statements; Multi-response
Q2	What does the notice instruct you to do? Check all that apply:
	() Pay a penalty
	 () Contact the IRS to review my payments (X) Deposit by the correct due date next quarter
	() Make an additional deposit
PN:	Ask everyone; Radio buttons; Randomize statements; Single response
Q3	When is your Federal Tax Deposit due?
	() At the end of each quarter
	(X) The due date depends on my business
	() At the end of each year
	() At the end of each month
PN:	Ask everyone; Radio buttons; Randomize statements; Single response
Q4	How is the failure-to-deposit penalty calculated?
	(X) It's calculated based on the number of days the deposit is late
	() It's calculated based on the amount deposited
	() It's calculated based on a flat rate
	() It's calculated based on which quarter the deposit was filed in
Simplicity Index Questions	
PN:	Ask everyone; Radio buttons, 1–5; randomize statements
QDOC2	Looking at this document, please tell us how much you agree or disagree with the following statements, where 5 is
	"Strongly agree" and 1 is "Strongly disagree"
Clarity	
	The notice is well organized
	It is easy for me to understand the content and wording in the notice
	The notice is visually clear
	The typeface and type size are easy to read
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Freshness	The tane of the notice is better then I synceted
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Usefulness	
	The notice helps me understand what actions I can take next
	The notice anticipates my questions
	The notice provides an appropriate level of detail
	The notice provides factual information for me to base my decision on
Inspiration	
	The notice makes me feel that the IRS wants me to be well informed
	The notice makes me feel like I can contact the IRS for help if I need it
Behavioral questions	
PN:	Ask everyone; Radio buttons
QDOC3	To what extent does the presentation and tone of the notice make you more likely to read the entire document?
	() Much more likely
	() Somewhat more likely
	() No difference
	() Somewhat less likely
	() Much less likely
PN:	Same
QDOC4	If you received this notice, what would you do? The more honest you can be about your response, the more it will help
	us create effective communications. Mark all that apply:
	() Not open it immediately, wait a few days/weeks until I had the time to focus on it
	() Contact an accountant for help () Call the IRS
	() Go to the IRS website (www.irs.gov) for help
	() Find an IRS publication for an explanation
	() Find an IRS tax clinic
	() Wait to see if I receive another notice
	 () I wouldn't do anything () Save it for reference when I file my next quarterly deposit
	() Save it for reference when this my next quarterly deposit

Preference questions		
PN:	Show wireframe document and allow respondent to click on only 1 document	
QDOC5	Click on the document that provided a clearer explanation for what you needed to do.	
PN:	Ask everyone; Open ended text box	
QDOC6	What is it about this notice that made it clearer?	
PN:	Ask everyone; Open ended text box	
QDOC7	Is there any other information that was left out, but would have helped you respond? If so, please describe.	
Thank you screen		

Notice	CP 22A (Adjustment - Outstanding Balance Due)
Sample Size	Total N=400
Intro Text & Disclaimer	We are conducting a web-based survey for the IRS to determine the effectiveness of its notices. The survey is voluntary, and we will keep information anonymous or private as allowed by law. The survey will only take about 20 minutes to complete. It involves reading and answering questions about two notices; there are XX pages in all.
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Screeners & Demographics	
PN:	Ask everyone; Single response
QS1	What is your gender?
PN:	() Female Ask everyone; Single response
QS2	() Under 18 (TERMINATE)
402	() 18–29
	() 30–39
	() 40–49
	() 50–59
PN:	() 60+ Ask everyone; Single response
PN: QS3	What is your marital status?
	() Married
	() Single
	() Divorced/Separated
	() Widowed
PN:	Ask everyone; Single response
QS4	Which of the following categories includes your annual household income? () Under \$25,000
	() \$25,000–\$34,999
	() \$35,000-\$49,999
	() \$50,000-\$75,000
	() \$100,000–\$149,000
	() \$150,000 or more
	Ana you of Hispania and stine existin (stherists)?
QS5 PN:	Are you of Hispanic or Latino origin (ethnicity)? () Yes
Ask everyone; Single response	() No
QS6	What is your race? Please select one or more. Are you
PN: Ask everyone; Single response. Accept all multiple answers.	() White () Black or African American
	() Asian
	() Native Hawaiian or other Pacific Islander
	() American Indian or Alaskan Native
PN:	Ask everyone; Single response; drop-down menu
QS7	In which state is your primary residence?
PN:	Ask everyone; Single response
QS8	Have you paid federal taxes in the past 5 years?
	() Yes () No (TERMINATE)
Document review	
Directions for reading through document	Read through the document; you must review all the pages, including the worksheet. You can use the thumbnails and arrows at the top to go from page to page. Use the scroll bar on the right to scroll through each page.
	If you find a section confusing or hard to understand, click on it with your mouse to indicate that it's confusing.
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PN: QDOC1	If the participant has marked items, an open-ended question will appear: You marked [X] section(s) as confusing or hard to understand. Describe what was most confusing to you.
QDOC1 Comprehension questions	
PN:	Ask everyone; Radio buttons; Randomize statements; Single response
Q1	Why have you received this notice?
	(X) My return was adjusted, and I owe less tax
	() I filed a 1040EZ instead of a 1040
	() I need to file an amended return for 2004
	() I owe penalties and interest

PN:	Ask everyone; open ended
Q2	What is the total amount you need to pay the IRS?
	Aak avanana. Dadia huttana, Dandamina atatamanta, Cingla raananaa
PN:	Ask everyone; Radio buttons; Randomize statements; Single response
Q3	What action does the notice instruct me to take?
	(X) Make a payment
	() Contact an accountant to help me
	() Appeal in writing by sending a certified letter
DN-	() Submit paperwork to prove the amount of income you reported was correct
PN:	Ask everyone; Radio buttons; Randomize statements; Multi-response
Q4	If you can't pay the full amount, which action(s) does the notice instruct you to take? Mark all that apply:
	() It doesn't suggest any actions
	(X) Pay as much as I can
	(X) Contact the IRS to make payment arrangements
	() Appeal in writing by sending a certified letter
	() Pay only the interest and penalties
PN:	Ask everyone; Radio buttons; Randomize statements; Single response
Q5	If you don't respond, what will happen?
a 5	() The notice doesn't say
	() You will be audited
	() The IRS will immediately seize your property
L	(X) You will owe more money since there will be additional interest and, possibly, penalties
PN:	Ask everyone, Radio buttons, Randomize statements; Multi-response
Q6	Why was your account corrected?
	(X) To change filing status to head of household
	(X) To change the total exemption amount?
	() The notice doesn't say
	() To change the total income amount
	(X) To change the total exemption amount
	() To remove a credit that was claimed
	() To change the total income amount
Simplicity Index Questions	
Simplicity Index Questions PN:	Ask everyone; Radio buttons, 1–5; randomize statements
	Ask everyone; Radio buttons, 1–5; randomize statements Looking at this document, please tell us how much you agree or disagree with the following statements, where 5 is
PN: QDOC2	
PN:	Looking at this document, please tell us how much you agree or disagree with the following statements, where 5 is "Strongly agree" and 1 is "Strongly disagree"
PN: QDOC2	Looking at this document, please tell us how much you agree or disagree with the following statements, where 5 is "Strongly agree" and 1 is "Strongly disagree" The notice is well organized
PN: QDOC2	Looking at this document, please tell us how much you agree or disagree with the following statements, where 5 is "Strongly agree" and 1 is "Strongly disagree" The notice is well organized It is easy for me to understand the content and wording in the notice
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PN:	Same
QDOC4	If you received this notice, what would you do? The more honest you can be about your response, the more it will help
	us create effective communications. Mark all that apply:
	() Not open it immediately, wait a few days/weeks until I had the time to focus on it
	() Contact an accountant for help
	() Call the IRS
	() Go to the IRS website (www.irs.gov) for help
	() Find an IRS publication for an explanation
	() Find an IRS tax clinic
	() Wait to see if I receive another notice
	() I wouldn't do anything
	() Pay in full
	() Request an installment plan or some other payment arrangement
	() Not pay
	() Other
Preference questions	
PN:	Show wireframe document and allow respondent to click on only 1 document
QDOC5	Click on the document that provided a clearer explanation for what you needed to do.
PN:	Ask everyone; Open ended text box
QDOC6	What is it about this notice that made it clearer?
PN:	Ask everyone; Open ended text box
QDOC7	Is there any other information that was left out, but would have helped you respond? If so, please describe.
Thank you screen	

Notice	CP523 (Intent to terminate Installment Agreement)
Sample Size	Total N=400
Intro Text & Disclaimer	We are conducting a web-based survey for the IRS to determine the effectiveness of its notices. The survey is voluntary, and we will keep information anonymous or private as allowed by law. The survey will only take about 20 minutes to complete. It involves reading and answering questions about two notices; there are XX pages in all.
	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 OMB# 1545-1432 . 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.
Screeners & Demographics	
PN:	Ask everyone; Single response
QS1	What is your gender?
	() Male () Female
PN:	Ask everyone; Single response
QS2	() Under 18 (TERMINATE)
	() 18–29 () 30–39
	() 40–49
	() 50–59
	() 60+
PN:	Ask everyone; Single response
QS3	What is your marital status?
	() Married
	() Single
	() Divorced/Separated
	() Widowed
PN:	Ask everyone; Single response
QS4	Which of the following categories includes your annual household income? () Under \$25,000
	() \$25,000-\$34,999
	() \$35,000-\$49,999 () \$50,000-\$75,000
	() \$100,000-\$149,000
	() \$150,000 or more
QS5	Are you of Hispanic or Latino origin (ethnicity)?
PN:	() Yes
Ask everyone; Single response	() No
QS6	What is your race? Please select one or more. Are you
PN: Ask everyone; Single response. Accept all multiple answers.	() White () Black or African American
	() Asian
	 () Native Hawaiian or other Pacific Islander () American Indian or Alaskan Native
PN:	Ask everyone; Single response; drop-down menu
QS7	In which state is your primary residence?
PN:	Ask everyone; Single response
QS8	Have you paid federal taxes in the past 5 years?
Decument	() No (TERMINATE)
Document review Directions for reading through	Read through the document; you must review all the pages, including the worksheet. You can use the thumbnails and
document	arrows at the top to go from page to page. Use the scroll bar on the right to scroll through each page.
	If you find a section confusing or hard to understand, click on it with your mouse to indicate that it's confusing.
	Once you've read all the pages, you'll be asked a series of questions about what you just read.
PN:	The participant reads (and clicks) through all pages and is taken to a series of comprehension questions. The
	participant is able to go back and review the document at any time. If the participant doesn't click on anything, before advancing to the comprehension questions, a reminder will pop up:
	"Do you want to mark anything as confusing or hard to understand? If you do, you can go back to any page and mark the document. Otherwise, you can continue to the questions."
PN:	If the participant has marked items, an open-ended question will appear:
QDOC1	You marked [X] section(s) as confusing or hard to understand. Describe what was most confusing to you.
Comprehension questions	Ask evenione: Padio buttons: Pandomizo statomonto: Single response
PN: Q1	Ask everyone; Radio buttons; Randomize statements; Single response Why have you received this notice?
	(X) I am late on my installment payments to the IRS
	() I owe additional tax
	() I didn't pay my taxes in full
	() I don't know

PN:	Ask everyone; open ended
Q2	What is the total amount you need to pay the IRS ?
DN	\$3,999.86
PN:	Ask everyone; open ended; Randomize statements; Single response
Q3	What action does the notice instruct you to take? (X) Pay my full amount due immediately
	() Apply for another installment agreement
	 () Pay my past due amount and any current payments immediately () Pay my taxes for this year
PN:	Ask everyone; Radio buttons; Randomize statements; Multi-response
FN.	Ask everyone, Radio bullons, Randomize statements, Multi-response
Q4	If you don't make a payment, what will happen? Mark all that apply:
	If you don't make a payment, what will happen? Mark all that apply:
	(X) The IRS may seize my state tax refund and apply it to my amount due
	(X) I will be charged additional penalties and interest
	(X) The IRS can file a Notice of Federal Tax Lien
	() I will need to apply for a new installment agreement
PN:	Ask everyone; open ended; Randomize statements; Single response
Q5	If you can't pay the amount due, what action does the notice instruct you to take?
	() It doesn't suggest any actions
	(X) Contact the IRS to discuss reinstating or restructuring my agreement
	() Appeal in writing by sending a certified letter
	() Pay the interest and penalties only
PN:	Ask everyone; Radio buttons; Randomize statements; Multi-response
Q6	What happens if the IRS reinstates your Installment Agreement? Mark all that apply:
	(X) I will be charged a \$45 reinstatement fee
	(X) The reinstatement fee will be deducted from my first payment
	() I will owe less money
-	() I will owe only penalties and interest
Q6	What happens if the IRS reinstates your Installment Agreement? Mark all that apply:
	(X) I will be charged a \$45 reinstatement fee
	(X) The reinstatement fee will be added to my first payment
	() I will owe less money
	() I will owe only penalties and interest
Simplicity Index Questions	
	Ask susman a Dadie butteres A. Er nen densing statements
PN:	Ask everyone; Radio buttons, 1–5; randomize statements
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QDOC2 <i>Clarity</i> <i>Freshness</i> <i>Honesty</i>	Looking at this document, please tell us how much you agree or disagree with the following statements, where 5 is "Strongly agree" and 1 is "Strongly disagree" The notice is well organized It is easy for me to understand the content and wording in the notice The notice is visually clear The typeface and type size are easy to read The notice helps me understand my situation The tone of the notice is better than I expected The tone of the notice is respectful The notice looks better than I expected The notice looks better than I expected The notice is straightforward The notice is straightforward The notice helps me understand what actions I can take next The notice provides an appropriate level of detail The notice provides an appropriate level of detail The notice provides factual information for me to base my decision on
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PN:	Same
QDOC4	If you received this notice, what would you do? The more honest you can be about your response, the more it will help
	us create effective communications. Mark all that apply:
	() Not open it immediately, wait a few days/weeks until I had the time to focus on it
	() Contact an accountant for help
	() Call the IRS
	() Go to the IRS website (www.irs.gov) for help
	() Find an IRS publication for an explanation
	() Find an IRS tax clinic
	() Wait to see if I receive another notice
	() I wouldn't do anything
	() Pay the amount due
	() Request to have your installment agreement restructured
	() Not pay
	() Other
Preference questions	
PN:	Show wireframe document and allow respondent to click on only 1 document
QDOC5	Click on the document that provided a clearer explanation for what you needed to do.
PN:	Ask everyone; Open ended text box
QDOC6	What is it about this notice that made it clearer?
PN:	Ask everyone; Open ended text box
QDOC7	Is there any other information that was left out, but would have helped you respond? If so, please describe.
Thank you screen	

Sample Size Tatil N400 Intro Text & Disclaimer We are conducting a web-based survey for the IRS to determine the effectiveness of its notices. The surve voluntary, and we will keep information anonymous or private as allowed by law. The survey will only take initiates to complete it: Involves reading and answering quasitions about monotes, there are XX pages in The Papervork Reduction Add regulars that the IRS display an OMB contin number on publics information with a two provides in the IRS display an OMB contin number on publics information reading the interview of the IRS display and IMB contin number on publics information was subject to IRS and the IRS display and IMB contin number on publics information Revenue Service, Tax Products Goordinating Committee, SE:WCAR.IMP.T.T.SP. 1111 Constitution Aves. IN Westington, IDC 20224. Servicencers & Damographics Add everyone: Single response PN: Add everyone: Single response (1) Jab.38 (1) Jab.38 (2) Jab.39 (1) Jab.39 (2) Jab.31 (1) Jab.32 (1) Jab.33 (1) Jab.34 (1) Jab.33 (1) Jab.34 (1) Jab.34 (1) Jab.34 (1) Jab.34 (1) Jab.34 (1) Jab.34 (1) Mored (1) Jab.34 (1) Mored (2) Mored Single response (2) Mored Single response (2) More Single response (3) More Single response	e CI	P2501 (1040 doesn't match what's was reported to the IRS)
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PN: Ask everyone; Single response GS1 What is your gender? () Mede () Female PN: Ask everyone; Single response GS2 () Under 18 (PKMINATE) GS2 () Under 18 (PKMINATE) () 10 = 20 () 10 = 20	Th es Re	he Paperwork Reduction Act requires that the IRS display an OMB control number on all public information requests. he OMB Control Number for this study is OMB# 1545-1432 . Also, if you have any comments regarding the time stimates associated with this study or suggestions on making this process simpler, please write to the Internal evenue Service, Tax Products Coordinating Committee, SE:W:CAR:MP:T:T:SP, 1111 Constitution Ave. NW, /ashington, DC 20224.
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() I need to file an amended return	•	

Ask everyone; Radio buttons; Randomize statements; Single response What action does the notice instruct you to take? (X) Review my 2006 tax return, compare it to what was reported by others, and complete and return the Response form () Contact third parties to determine why information doesn't match () Pay the amount due, including interest and penalties () Review my 2006 return and compare it to what was reported by others, and file an amended return Ask everyone; Radio buttons; Randomize statements; Single response If you agree with the information shown, what action does the notice instruct you to take? () File an amended return, along with supporting documents, such as a corrected W-2 () Wait until I receive a notice of proposed tax changes (X) Indicate on the Response form that I agree with the information, and that I understand I'll receive a notice with
 (X) Review my 2006 tax return, compare it to what was reported by others, and complete and return the Response form () Contact third parties to determine why information doesn't match () Pay the amount due, including interest and penalties () Review my 2006 return and compare it to what was reported by others, and file an amended return Ask everyone; Radio buttons; Randomize statements; Single response If you agree with the information shown, what action does the notice instruct you to take? () File an amended return, along with supporting documents, such as a corrected W-2 () Wait until I receive a notice of proposed tax changes
 () Contact third parties to determine why information doesn't match () Pay the amount due, including interest and penalties () Review my 2006 return and compare it to what was reported by others, and file an amended return Ask everyone; Radio buttons; Randomize statements; Single response If you agree with the information shown, what action does the notice instruct you to take? () File an amended return, along with supporting documents, such as a corrected W-2 () Wait until I receive a notice of proposed tax changes
 () Pay the amount due, including interest and penalties () Review my 2006 return and compare it to what was reported by others, and file an amended return Ask everyone; Radio buttons; Randomize statements; Single response If you agree with the information shown, what action does the notice instruct you to take? () File an amended return, along with supporting documents, such as a corrected W-2 () Wait until I receive a notice of proposed tax changes
 () Pay the amount due, including interest and penalties () Review my 2006 return and compare it to what was reported by others, and file an amended return Ask everyone; Radio buttons; Randomize statements; Single response If you agree with the information shown, what action does the notice instruct you to take? () File an amended return, along with supporting documents, such as a corrected W-2 () Wait until I receive a notice of proposed tax changes
 () Review my 2006 return and compare it to what was reported by others, and file an amended return Ask everyone; Radio buttons; Randomize statements; Single response If you agree with the information shown, what action does the notice instruct you to take? () File an amended return, along with supporting documents, such as a corrected W-2 () Wait until I receive a notice of proposed tax changes
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 () File an amended return, along with supporting documents, such as a corrected W-2 () Wait until I receive a notice of proposed tax changes
() Wait until I receive a notice of proposed tax changes
(X) Indicate on the Response form that Lagree with the information, and that Lunderstand I'll receive a notice with
המוסמוב סוד והב הכסףסווסב וסודו נומג דמקובב אונה נוב והסודומנוסוי, מוט נוומג דעווטבוסנמוט דוו ובטבועב מ ווטנוכל אונו
proposed tax changes
() Contact an accountant to help me
Ask everyone; Radio buttons; Randomize statements; Single response
If you disagree with the information shown, what action does the notice instruct you to take?
(X) Indicate on the Response form that I don't agree with the changes, and send supporting documents, such as a
corrected W-2
() Contact the IRS to review my account
() File an amended return, along with supporting documents, such as a corrected W-2
() Wait until I receive a notice of proposed tax changes
Ask everyone; Radio buttons; Randomize statements; Multi-response
If you don't respond, what does the notice say will happen? Mark all that apply:
 () The notice doesn't say (X) I will owe more money since there will be additional interest and, possibly, penalties
(X) I will receive a notice explaining the proposed changes to my return
() I will be audited
() The IRS will immediately seize my property
Ask everyone; Radio buttons; Randomize statements; Multi response
What action does the response form instruct you to take? Mark all that apply:
(X) Give my contact information
(X) Choose whether I agree or disagree with the information
(X) Send the completed form to the IRS and any supporting documents if I disagree with the information listed
() Return the form with my return
Ask everyone; Radio buttons, 1–5; randomize statements
Looking at this document, please tell us how much you agree or disagree with the following statements, where 5 is
"Strongly agree" and 1 is "Strongly disagree"
The notice is well organized
It is easy for me to understand the content and wording in the notice
The notice is visually clear
The typeface and type size are easy to read
The notice helps me understand my situation
The tone of the notice is better than I expected
The tone of the notice is respectful
The notice looks better than I expected
The notice is straightforward
The notice explains the IRS's decisions and the reasoning behind them
The notice helps me understand what actions I can take next
The notice anticipates my questions
The notice provides an appropriate level of detail
The notice provides factual information for me to base my decision on
The notice makes me feel that the IRS wants me to be well informed

Behavioral questions	
PN:	Ask everyone; Radio buttons
QDOC3	To what extent does the presentation and tone of the notice make you more likely to read the entire document?
	() Much more likely
	() Somewhat more likely
	() No difference
	() Somewhat less likely
	() Much less likely
PN:	Same
QDOC4	If you received this notice, what would you do? The more honest you can be about your response, the more it will help us create effective communications. Mark all that apply:
	() Not open it immediately, wait a few days/weeks until I had the time to focus on it
	() Contact an accountant for help
	() Call the IRS
	() Go to the IRS website (www.irs.gov) for help
	() Find an IRS publication for an explanation
	() Find an IRS tax clinic
	() Wait to see if I receive another notice
	() I wouldn't do anything
	() Review my return and complete the response form
	() Other
Preference questions	
PN:	Show wireframe document and allow respondent to click on only 1 document
QDOC5	Click on the document that provided a clearer explanation for what you needed to do.
PN:	Ask everyone; Open ended text box
QDOC6	What is it about this notice that made it clearer?
PN:	Ask everyone; Open ended text box
QDOC7	Is there any other information that was left out, but would have helped you respond? If so, please describe.
Thank you screen	

Notice	CP566SP (Information needed to process Form W-7)
Sample Size	Total N=400
Intro Text & Disclaimer	We are conducting a web-based survey for the IRS to determine the effectiveness of its notices. The survey is voluntary, and we will keep information anonymous or private as allowed by law. The survey will only take about 20 minutes to complete. It involves reading and answering questions about two notices; there are XX pages in all.
	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 OMB# 1545-1432 . 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.
Screeners & Demographics	
PN:	Ask everyone; Single response
QS1	What is your gender?
	() Male
	() Female
PN:	Ask everyone; Single response
QS2	() Under 18 (TERMINATE)
	() 18–29 () 30–39
	()40-49
	() 50–59
	() 60+
PN:	Ask everyone; Single response
QS3	What is your marital status?
	() Married
	() Single () Divorced/Separated
	() Widowed
PN:	Ask everyone; Single response
QS4	Which of the following categories includes your annual household income?
	() Under \$25,000
	() \$25,000–\$34,999
	() \$35,000-\$49,999
	() \$50,000-\$75,000
	()\$100,000-\$149,000 ()\$150,000 or more
	() \$150,000 or more () Prefer not to say
QS5	Are you of Hispanic or Latino origin (ethnicity)?
PN:	() Yes
Ask everyone; Single response	() No
QS6 PN:	What is your race? Please select one or more. Are you () White
Ask everyone; Single response. Accept	
all multiple answers.	
	() Asian
	() Native Hawaiian or other Pacific Islander
	() American Indian or Alaskan Native
PN:	Ask everyone; Single response; drop-down menu
QS7	In which state is your primary residence?
PN:	Ask everyone; Single response
QS8	Have you paid federal taxes in the past 5 years?
	() Yes
Desumer	() No (TERMINATE)
Document review	Read through the document; you must review all the pages, including the worksheet. You can use the thumbnails and
Directions for reading through document	arrows at the top to go from page to page. Use the scroll bar on the right to scroll through each page.
	If you find a section confusing or hard to understand, click on it with your mouse to indicate that it's confusing.
PN:	Once you've read all the pages, you'll be asked a series of questions about what you just read. The participant reads (and clicks) through all pages and is taken to a series of comprehension questions. The participant is able to go back and review the document at any time. If the participant doesn't click on anything, before
	 advancing to the comprehension questions, a reminder will pop up: "Do you want to mark anything as confusing or hard to understand? If you do, you can go back to any page and mark the document. Otherwise, you can continue to the questions."
PN:	If the participant has marked items, an open-ended question will appear:
QDOC1	You marked [X] section(s) as confusing or hard to understand. Describe what was most confusing to you.
Comprehension questions	
PN:	Ask everyone; Radio buttons; Randomize statements; Single response
Q1	Why have you received this notice?
	 () I am being assigned a Social Security number (X) The W-7 application I filed is missing information
	() I need to refile my W-7 application

PN:	Ask everyone; Radio buttons; Randomize statements; Multi-response
Q2	What IRS criteria is necessary for your U.S. issued documentation to be considered valid? Mark all that apply:
	() Be issued by USCIS, U.S. military or U.S. state agency
	() Be unexpired
	() Show my name (must match my name on the Form W-7 and your tax return)
	() Show the applicant is under 18 years of age at the time of the application for medical and/or school records
	(X) All of the above
PN:	Ask everyone; Radio buttons; Randomize statements; Single response
23	If you are submitting copies of your documentation it must be:
	 () Photocopied in color (X) Notarized by a U.S. Notary Public or by a foreign notary
	() Stamped "for unofficial use only"
	() Photocopied on the front side only if documentation has information on both sides
PN:	
	Ask everyone; Radio buttons; Randomize statements; Single response
24	If we don't receive your Response form and supporting documentation by April 15, 2008, what will happen to your
• -	application?
	(X) My application will be denied
	() My application will be processed and I will be issued a temporary Individual Tax Identification number (ITIN)
	() My application will be on hold indefinitely
	() My application will be mailed to my foreign consulate in Washington, D.C. for processing
PN:	Ask everyone; Radio buttons; Randomize statements; Multi-response
25	The following documents are accepted by the IRS that can prove your foreign status and identity. Mark all that apply:
	() Foreign driver's license
	(X) Foreign military identification card
	(X) National identification card
	() U.S. state identification card
PN:	Ask everyone; Radio buttons; Randomize statements; Single response
26	What should you do if you're eligible for the credit?
×U	
26	How should you send your response and any documentation?
	(X) By mail
	() By email
	() By fax
	() By Federal Express
Simplicity Index Questic	
PN:	Ask everyone; Radio buttons, 1–5; randomize statements
QDOC2	Looking at this document, please tell us how much you agree or disagree with the following statements, where 5 is
Clarity	"Strongly agree" and 1 is "Strongly disagree"
Janty	The notice is well organized
	It is easy for me to understand the content and wording in the notice
	The notice is visually clear
	The typeface and type size are easy to read
	The notice helps me understand my situation
Freshness	
	The tone of the notice is better than I expected
	The tone of the notice is respectful
	The notice looks better than I expected
Honesty	
	The notice is straightforward
	The notice explains the IRS's decisions and the reasoning behind them
Isefulness	
	The notice helps me understand what actions I can take next
	The notice anticipates my questions The notice provides an appropriate level of detail

	The notice provides an appropriate level of detail
	The notice provides factual information for me to base my decision on
Inspiration	
	The notice makes me feel that the IRS wants me to be well informed
	The notice makes me feel like I can contact the IRS for help if I need it

Behavioral questions	
PN:	Ask everyone; Radio buttons
QDOC3	To what extent does the presentation and tone of the notice make you more likely to read the entire document?
	() Much more likely
	() Somewhat more likely
	() No difference
	() Somewhat less likely
	() Much less likely
PN:	Same
QDOC4	If you received this notice, what would you do? The more honest you can be about your response, the more it will help us create effective communications. Mark all that apply:
	() Not open it immediately, wait a few days/weeks until I had the time to focus on it
	() Contact an accountant for help
	() Call the IRS
	() Go to the IRS website (www.irs.gov) for help
	() Find an IRS publication for an explanation
	() Find an IRS tax clinic
	() Wait to see if I receive another notice
	() I wouldn't do anything
	() Submit the original documentation I have and not bother to photocopy it
Preference questions	
PN:	Show wireframe document and allow respondent to click on only 1 document
QDOC5	Click on the document that provided a clearer explanation for what you needed to do.
PN:	Ask everyone; Open ended text box
QDOC6	What is it about this notice that made it clearer?
PN:	Ask everyone; Open ended text box
QDOC7	Is there any other information that was left out, but would have helped you respond? If so, please describe.
Thank you screen	

Notice	CP75 (Auditing Form 1040)
Sample Size	Total N=400
Intro Text & Disclaimer	We are conducting a web-based survey for the IRS to determine the effectiveness of its notices. The survey is voluntary, and we will keep information anonymous or private as allowed by law. The survey will only take about 20 minutes to complete. It involves reading and answering questions about two notices; there are XX pages in all.
	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 OMB# 1545-1432 . 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.
Screeners & Demographics	
PN:	Ask everyone; Single response
QS1	What is your gender?
	() Male () Female
PN:	Ask everyone; Single response
QS2	() Under 18 (TERMINATE)
	() 18–29 () 30–39
	() 40–49
	() 50–59 () 60+
PN:	Ask everyone; Single response
QS3	What is your marital status? () Married
	() Single
	() Divorced/Separated
	() Widowed
PN:	Ask everyone; Single response
QS4	Which of the following categories includes your annual household income? () Under \$25,000
	() \$25,000-\$34,999
	() \$35,000-\$49,999
	() \$50,000–\$75,000 () \$100,000–\$149,000
	() \$150,000 or more
	() Prefer not to say
QS5	Are you of Hispanic or Latino origin (ethnicity)?
PN:	() Yes
Ask everyone; Single response	() No
QS6	What is your race? Please select one or more. Are you
PN: Ask everyone; Single response. Accept all multiple answers.	() White () Black or African American
<u></u>	() Asian
	() Native Hawaiian or other Pacific Islander
	() American Indian or Alaskan Native
PN:	Ask everyone; Single response; drop-down menu
QS7	In which state is your primary residence?
PN:	Ask everyone; Single response
QS8	Have you paid federal taxes in the past 5 years?
	() Yes () No (TERMINATE)
Document review	
Directions for reading through document	Read through the document; you must review all the pages, including the worksheet. You can use the thumbnails and arrows at the top to go from page to page. Use the scroll bar on the right to scroll through each page.
	If you find a section confusing or hard to understand, click on it with your mouse to indicate that it's confusing.
	Once you've read all the pages, you'll be asked a series of questions about what you just read.
PN:	The participant reads (and clicks) through all pages and is taken to a series of comprehension questions. The
	participant is able to go back and review the document at any time. If the participant doesn't click on anything, before advancing to the comprehension questions, a reminder will pop up:
	"Do you want to mark anything as confusing or hard to understand? If you do, you can go back to any page and mark the document. Otherwise, you can continue to the questions."
PN:	If the participant has marked items, an open-ended question will appear:
QDOC1	You marked [X] section(s) as confusing or hard to understand. Describe what was most confusing to you.
Comprehension questions	
PN:	Ask everyone; Radio buttons; Randomize statements; Multi-response
Q1	Why have you received this notice? (X) My tax return is being audited, and I need to provide the IRS with additional information
	() Credits I claimed aren't being allowed
	() To notify me that I don't qualify for the Earned Income Credit (EIC)
	(X) To notify me that my refund for the Earned Income Credit (EIC) is being held

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PN:	Ask everyone; Radio buttons; Randomize statements; Single response
Q2	What action does the notice instruct you to take?
	(X) Send the IRS the requested information
	() File an amended return
	() Contact the IRS for more information
	() Gather documentation I'll need to have on hand
PN:	Ask everyone; Radio buttons; Randomize statements; Multi response
Q3	What items are being audited? Mark all that apply:
	(X) Earned Income Credit
	(X) Dependents
	(X) Filing Status
	() Schedule C
PN:	Ask everyone; Radio buttons; Randomize statements; Multi-response
	Lieu de veu determine obtetinformation to a codO Made all that annu n
Q4	How do you determine what information to send? Mark all that apply:
	What action(s) does the notice instruct you to take?
	(X) I need to review Form 886-H-EIC and take the tests listed
	() I need to contact the IRS
	() Redo my taxes
	(X) I need to review Form 11652
	() I don't know
PN:	Ask everyone; Radio buttons; Randomize statements; Multi-response
Q5	What happens if you don't respond?
	(X) The IRS will disallow the items I've claimed, and I won't receive my EIC refund
	(X) I may owe additional tax
	() I won't be able to claim the EIC credit next year
	() I will be audited next year
PN:	Ask everyone; Radio buttons; Randomize statements; Single response
Q6	
Q6	What should you do if you can't submit the documents by their due date?
	(X) Call the IRS to discuss my options
	() Submit the documents after the due date
	() Don't submit the documents
	() Submit the documents when I file an amended return
Simplicity Index Questions	Ask susman as Dadia kuttana . 4. Es sandamina atatamanta
PN:	Ask everyone; Radio buttons, 1–5; randomize statements
QDOC2	Looking at this document, please tell us how much you agree or disagree with the following statements, where 5 is
Clarity	"Strongly agree" and 1 is "Strongly disagree"
Clarity	The notice is well organized
	It is easy for me to understand the content and wording in the notice
	The notice is visually clear
	The typeface and type size are easy to read
	The notice helps me understand my situation
Freshness	רוב חטווטב חבוףה חב טחטבוהומות חוץ הונומווטוו
1 1001111000	The tone of the notice is better than I expected
	The tone of the notice is respectful
Hanasty	The notice looks better than I expected
Honesty	The notice is straightforward
	The notice is straightforward The notice explains the IRS's decisions and the reasoning behind them
Usofulnoss	The notice explains the IRS's decisions and the reasoning behind them
Usefulness	The notice helps me understand what actions Lean take next
	The notice helps me understand what actions I can take next
	The notice anticipates my questions
	The notice provides an appropriate level of detail
Inonivotion	The notice provides factual information for me to base my decision on
Inspiration	The notice makes me feel that the IDC wants me to be well informed
1	The notice makes me feel that the IRS wants me to be well informed

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The notice makes me feel like I can contact the IRS for help if I need it

Behavioral questions	
PN:	Ask everyone; Radio buttons
QDOC3	To what extent does the presentation and tone of the notice make you more likely to read the entire document?
	() Much more likely
	() Somewhat more likely
	() No difference
	() Somewhat less likely
	() Much less likely
PN:	Ask everyone; Radio buttons; Randomize statements
QDOC4	If you received this notice, what would you do? The more honest you can be about your response, the more it will help us create effective communications. Mark all that apply:
	() Not open it immediately, wait a few days/weeks until I had the time to focus on it
	() Contact an accountant for help
	() Call the IRS
	() Go to the IRS website (www.irs.gov) for help
	() Find an IRS publication for an explanation
	() Find an IRS tax clinic
	() Wait to see if I receive another notice
	() I wouldn't do anything
	() Provide the information that's being requested
	() Other
Preference questions	
PN:	Show wireframe document and allow respondent to click on only 1 document
QDOC5	Click on the document that provided a clearer explanation for what you needed to do.
PN:	Ask everyone; Open ended text box
QDOC6	What is it about this notice that made it clearer?
PN:	Ask everyone; Open ended text box
QDOC7	Is there any other information that was left out, but would have helped you respond? If so, please describe.
Thank you screen	

Notice	CP2566 (have not filed return)
Sample Size	Total N=400
Intro Text & Disclaimer	We are conducting a web-based survey for the IRS to determine the effectiveness of its notices. The survey is voluntary, and we will keep information anonymous or private as allowed by law. The survey will only take about 20 minutes to complete. It involves reading and answering questions about two notices; there are XX pages in all. 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 OMB# 1545-1432 . 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.
Screeners & Demographics	
PN:	Ask everyone; Single response
QS1	What is your gender?
	() Male
	() Female
PN:	Ask everyone; Single response
QS2	() Under 18 (TERMINATE)
	() 18–29
	() 30–39
	() 40–49
	() 50–59
	()60+
PN:	Ask everyone; Single response
QS3	What is your marital status?
	() Married
	() Single
	() Divorced/Separated
	() Widowed
PN:	Ask everyone; Single response
QS4	Which of the following categories includes your annual household income?
	() Under \$25,000
	() \$25,000-\$34,999
	() \$35,000-\$49,999
	() \$50,000-\$75,000
	() \$100,000-\$149,000
	() \$150,000 or more

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QS5	Are you of Hispanic or Latino origin (ethnicity)?
PN:	() Yes
Ask everyone; Single response	() No
086	What is your resear. Places calest one or more. Are you
QS6 PN:	What is your race? Please select one or more. Are you () White
Ask everyone; Single response. Accept	
all multiple answers.	
	() Asian
	() Native Hawaiian or other Pacific Islander
	() American Indian or Alaskan Native
PN:	Ask everyone; Single response; drop-down menu
QS7	In which state is your primary residence?
PN:	Ask everyone; Single response
QS8	Have you paid federal taxes in the past 5 years?
	()Yes
	() No (TERMINATE)
Document review	
Directions for reading through	Read through the document; you must review all the pages, including the worksheet. You can use the thumbnails and
document	arrows at the top to go from page to page. Use the scroll bar on the right to scroll through each page.
	If you find a section confusing or hard to understand, click on it with your mouse to indicate that it's confusing.
	Once you've read all the pages, you'll be asked a series of questions about what you just read.
PN:	The participant reads (and clicks) through all pages and is taken to a series of comprehension questions. The
	participant is able to go back and review the document at any time. If the participant doesn't click on anything, before
	advancing to the comprehension questions, a reminder will pop up:
	"Do you want to mark anything as confusing or hard to understand? If you do, you can go back to any page and mark the document. Otherwise, you can continue to the questions."
PN:	If the participant has marked items, an open-ended question will appear:
QDOC1	You marked [X] section(s) as confusing or hard to understand. Describe what was most confusing to you.
Comprehension questions	
PN:	Ask everyone; Radio buttons; Randomize statements; Multi-response
Q1	Why have you received this notice?
	() My tax return is being audited, and I need to provide the IRS with additional information
	(X) I haven't filed my tax return and need to
	() I have to make a payment
	() I have to file an amended return
PN:	Ask everyone; Radio buttons; Randomize statements; Multi-response
Q2	What action does the notice instruct you to take? Mark all that apply:
	(X) Complete the response form
	(X) File my tax return
	(X) Accept the proposed amount due and pay now if I agree with the changes to my return
	() Wait to receive a bill showing a final amount due
PN:	Ask everyone; Radio buttons; Randomize statements; Multi-response
Q3	What happens if you don't respond? Mark all that apply:
	(X) I will be charged penalties and interest until my amount due is paid in full
	() I will be audited next year
	(X) My tax will be calculated based on information the IRS received from others, and I may not receive certain
	exemptions, deductions or credits
	() My property will be seized
PN:	Ask everyone; Open ended
Q4	At this point in time, what is the total amount you need to pay?
	What action(s) does the notice instruct you to take?
	\$999,999.99
DNI-	Aak avanana: Radia buttana: Randamiza atatamanta: Multi raananaa
PN:	Ask everyone; Radio buttons; Randomize statements; Multi-response
Q5	Why are you being charged penalties? Mark all that apply:
	(X) I did not file my return on time(X) I did not pay my taxes on time
	 () I did not pay my interest () I did not file an amended return
PN:	Ask everyone; Open ended
Q6	
Q6	At this point in time, what is the amount of interest you're being charged?
	\$999.99
1	มูงอง.งง

Simplicity Index Questions	
PN:	Ask everyone; Radio buttons, 1–5; randomize statements
QDOC2	Looking at this document, please tell us how much you agree or disagree with the following statements, where 5 is
	"Strongly agree" and 1 is "Strongly disagree"
Clarity	
	The notice is well organized
	It is easy for me to understand the content and wording in the notice
	The notice is visually clear
	The typeface and type size are easy to read
	The notice helps me understand my situation
Freshness	
	The tone of the notice is better than I expected
	The tone of the notice is respectful
	The notice looks better than I expected
Honesty	
	The notice is straightforward
	The notice explains the IRS's decisions and the reasoning behind them
Usefulness	The notice helps me understand what actions have take rout
	The notice helps me understand what actions I can take next
	The notice anticipates my questions
	The notice provides an appropriate level of detail
Inonivotion	The notice provides factual information for me to base my decision on
Inspiration	The notice makes me feel that the IRS wants me to be well informed
	The notice makes me feel like I can contact the IRS for help if I need it
Behavioral questions	
PN:	Ask everyone; Radio buttons
QDOC3	To what extent does the presentation and tone of the notice make you more likely to read the entire document?
	() Much more likely
	() Somewhat more likely
	() No difference
	() Somewhat less likely
	() Much less likely
PN:	Ask everyone; Radio buttons; Randomize statements
QDOC4	If you received this notice, what would you do? The more honest you can be about your response, the more it will help
	us create effective communications. Mark all that apply:
	() Not open it immediately, wait a few days/weeks until I had the time to focus on it
	() Contact an accountant for help
	() Call the IRS
	() Go to the IRS website (www.irs.gov) for help
	() Find an IRS publication for an explanation
	() Find an IRS tax clinic
	() Wait to see if I receive another notice
	() I wouldn't do anything
	() File my return
	() Accept the proposed amount due and pay it immediately
	() Other
Preference questions	
PN:	Show wireframe document and allow respondent to click on only 1 document
QDOC5	Click on the document that provided a clearer explanation for what you needed to do.
PN:	Ask everyone; Open ended text box
QDOC6	What is it about this notice that made it clearer?
PN:	Ask everyone; Open ended text box
QDOC7	Is there any other information that was left out, but would have helped you respond? If so, please describe.
Thank you screen	

Appendix 2

Survey Invitation Example:

Below is an example of a sample survey invitation. Our invitation will include #OMB#1545-1432 and PRA Statement, the amount of time it will take to complete the survey and the fact that it is voluntary.

	{first_name} {last_name} » Account #{id_panelist} » MarketPoin {MPOINTS_CURREN
GlobalTestMarket is looking for your opinion.	
	A new survey is available
	Survey Number: {CUSTOM.ID_STUDY} MarketPoints for survey: 5 -50 Start Survey »
You can als <u>{link}</u> Best regar GlobalTest	
	arket validates data by analyzing the quality of responses at several key points within th ss. Additionally, there are automatic checks and alerts built into its systems that limit and check for multiple accounts upon redemption of awards. As a participant, you agree
membership abide by our If for some	terms & conditions. reason you no longer wish to participate, please <u>click here</u> to log into your account. If yo contact us in regards to your account, please <u>click here</u> .

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