



TAS's LITC User Survey  
SCREENER

NOTE: GREEN BOXED NOTES OR GREEN FONT CALL TAS' ATTENTION TO CHANGES TO THE QUESTIONNAIRE SINCE LAST DRAFT.

RESPONDENT INFO

PARTICIPANT NAME \_\_\_\_\_

QUOTAS:

Total Random Sample.....n=1,000 ...09

Spanish-Speaking Augments (50-60 from Random Sample).....n=140-150

- THE SAMPLE MUST BE REPRESENTATIVE OF THE POPULATION OF POTENTIAL PARTICIPANTS WHO ARE AT OR BELOW 250% OF THE FEDERAL POVERTY LEVEL. CHARACTERISTICS OF THIS SAMPLE WILL BE PROVIDED BY TAS.
- THE SAMPLE WILL BE A RDD SAMPLE AND WILL BE REPRESENTATIVE OF BOTH LAND LINE AND CELL PHONE NUMBERS.
- WITH THE 1,000 RANDOM SAMPLE, RUSSELL IS EXPECTING TO END WITH APPROXIMATELY 50-60 SPANISH-SPEAKING RESPONDENTS IN THE RANDOM SAMPLE - AN AUGMENT OF APPROXIMATELY 140-150 SPANISH-SPEAKING RESPONDENTS WILL BE COLLECTED TO BRING THIS QUOTA UP TO n=200.
- RUSSELL WILL PROVIDE A TRANSLATED SPANISH-LANGUAGE QUESTIONNAIRE TO BE USED WITH SPANISH-SPEAKING RESPONDENTS.
- TAB: RUSSELL WILL PROVIDE TAS WITH A DATASET IN SPSS OR SAS FORMAT WITH ALL SURVEY RESPONSES.

RECORD DATE, TIME & DISPOSITION FOR EACH ATTEMPT AT SCREENING/RECRUITING THIS PERSON.

		Disc	NA	Unavail	Ref	NQ	Comp	
1	DATE: _____ TIME: _____ (am) (pm) .....	1	2	3	4	5	6	...10
2	DATE: _____ TIME: _____ (am) (pm) .....	1	2	3	4	5	6	...11
3	DATE: _____ TIME: _____ (am) (pm) .....	1	2	3	4	5	6	...12
4	DATE: _____ TIME: _____ (am) (pm) .....	1	2	3	4	5	6	...13
5	DATE: _____ TIME: _____ (am) (pm) .....	1	2	3	4	5	6	...14
6	DATE: _____ TIME: _____ (am) (pm) .....	1	2	3	4	5	6	...15
7	DATE: _____ TIME: _____ (am) (pm) .....	1	2	3	4	5	6	...16
8	DATE: _____ TIME: _____ (am) (pm) .....	1	2	3	4	5	6	...17
9	DATE: _____ TIME: _____ (am) (pm) .....	1	2	3	4	5	6	...18
10	DATE: _____ TIME: _____ (am) (pm) .....	1	2	3	4	5	6	...19

INTERVIEWER \_\_\_\_\_

THE RDD SAMPLE LISTS WILL BE DRAWN TO BE REPRESENTATIVE OF POPULATION OF BOTH LAND LINE AND CELL PHONES NUMBERS. AFTER REACHING A POTENTIAL PARTICIPANT, INTRODUCE YOURSELF WITH: Hello, I'm \_\_\_\_\_ of Russell Research in New York, an independent national research firm. The Internal Revenue Service wants Taxpayers' feedback on specific IRS services, and has asked us to survey Taxpayers and get your ideas on some of these services. Your participation in this survey is entirely voluntary and your responses will be kept strictly private and never revealed to anyone - including the IRS. The survey should take about 20 minutes to complete and we'd appreciate your participation. (IF ANY HESITATION, READ...) If you have any concerns about talking to us in this survey, please log onto irs.gov and search "market research", where you'll see examples of the survey work Russell Research has conducted for the IRS over the past 15 years.

OMB REQUIRES A FOLLOW-UP SUMMARY OF THE DATA COLLECTION PROCESS, COMPLETE WITH TOTAL NUMBER OF RESPONDENTS SCREENED, TOTAL NUMBER OF RESPONDENTS ASKED TO PARTICIPATE IN THE SURVEY, TOTAL NUMBER OF RESPONDENTS WHO AGREED TO TAKE SURVEY, FINAL RESPONSE RATES, AND BURDEN HOURS USED - SEPARATELY FOR THE SCREENING SECTION AND THE MAIN SURVEY. THIS INFORMATION WILL BE PROVIDED TO TAS AT THE COMPLETION OF THE PROJECT.

(IF AGREEABLE, CONTINUE...) We are required by law to provide you the Office Of Management and Budget Control Number for this 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 can 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. Are you willing to participate in the survey?

- >> IF "YES", CONTINUE w/Q1 - UNLESS YOU SENSE RESPONDENT SPEAKS MAINLY SPANISH, IN WHICH CASE, ASK RESPONDENT TO HOLD WHILE YOU TRANSFER TO A SPANISH-SPEAKING INTERVIEWER, WHO WILL ASK WHICH LANGUAGE THEY PREFER TO BE INTERVIEWED IN.
- >> IF "NO"/REFUSED, THANK & RECORD AS "Ref" FOR THIS ATTEMPT IN BOX ON COVER PAGE AND THEN MOVE THIS RESPONDENT INTO THE RE-CONTACT CATEGORY FOR FOLLOWUP ON REFUSALS.

CLIENT NOTE: THE "DON'T KNOW" AND "PREFER NOT TO ANSWER" RESPONSE CATEGORIES NOT READ TO RESPONDENTS, BUT INSTEAD USED AS A PLACE TO RECORD THESE ANSWERS WHEN THEY ARE VOLUNTEERED BY THE RESPONDENT.

S1. For the record, are you male or female? (RECORD ANSWER BELOW.)

GENDER SPLITS/SKEWS WILL BE DEVELOPED BY TAS AS IT DEVELOPS DATA FOR ITS LISTS. IF NEEDED, SAMPLE CAN BE QUOTA'D.

Male.....1 ...00  
 Female.....2

>> IF QUOTAS & OVER QUOTA, THANK, TERM & TALLY BELOW. OTHERWISE, CONTINUE.

1    2    3    4    5    6    7    8    9    10

S2. And which of the following age categories includes your age? (READ CHOICES AS SHOWN BELOW & RECORD ANSWER.)

AGE DISTRIBUTION OF TARGET AUDIENCE WILL BE DEVELOPED BY TAS AS IT DEVELOPS LISTS. IF NEEDED, SAMPLE CAN BE QUOTA'D.

Under 18.....1 ...00  
 18 to 24.....2  
 25 to 34.....3  
 35 to 44.....4  
 45 to 54.....5  
 55 to 64.....6  
 65 or Older.....7

(DON'T READ, BUT RECORD IF:) Prefer Not To Answer (TERMINATE)

>> IF QUOTAS & OVER QUOTA OR IF RESPONDENT PREFERS NOT TO ANSWER, THEN THANK, TERM & TALLY BELOW. OTHERWISE, CONTINUE WITH THE NEXT SCREENING QUESTION.

1    2    3    4    5    6    7    8    9    10

S3. Are you the person responsible for handling Federal Income Tax matters in your household? (RECORD ONE ANSWER.)

Yes (CONTINUE).....1 ...00  
 No (ASK TO SPEAK WITH PERSON IN HH WHO DOES HANDLE TAX MATTERS).....2  
 (DON'T READ, BUT RECORD IF:) Prefer Not To Answer.....(TERMINATE)

>> IF YES CONTINUE. OTHERWISE, THANK, TERM & TALLY BELOW. OTHERWISE, CONTINUE.

1    2    3    4    5    6    7    8    9    10

54. Have you filed a Federal Income Tax return at least once in the last three years? (RECORD ANSWER.)

Yes .....(CONTINUE)

No .....(TERMINATE)

(DON'T READ, BUT RECORD IF:) Don't Know .....(TERMINATE)

(DON'T READ, BUT RECORD IF:) Prefer Not To Answer.(TERMINATE)

>> IF YES, CONTINUE. OTHERWISE THANK, TERM & TALLY BELOW. OTHERWISE, CONTINUE.

1	2	3	4	5	6	7	8	9	10
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55. Including yourself, how many people live in your household? (ENTER NUMBER.)

Number in Household.....

...00-00

(DON'T READ, BUT RECORD IF:) Prefer Not To Answer.(TERMINATE)

>> IF 1+, CONTINUE. OTHERWISE THANK, TERM & TALLY BELOW. OTHERWISE, CONTINUE.

1	2	3	4	5	6	7	8	9	10
---	---	---	---	---	---	---	---	---	----

56. Which of the following best describes where you currently live? (READ CHOICES AND RECORD ONE ANSWER - IF ANY OF THE 48 STATES IN CONTINENTAL US NAMED, RECORD ANSWER AS "48 CONTIGUOUS STATES".)

48 Contiguous States.....1

...00

Hawaii .....2

Alaska.....3

(DON'T READ, BUT RECORD IF:) Prefer Not To Answer (TERMINATE)

**USE THE PROVIDED INCOME/HOUSEHOLD CHART TO PIPE IN INCOME FOR Q57:**

57. Is the total annual income of your household - including all sources of income - more than \$ (PIPE IN AMOUNT USING INCOME/HH CHART AND WITH HH SIZE AND RESIDENCE BASED ON Q55 & Q56) a year? (RECORD ANSWER.)

Yes .....(TERMINATE)

No .....(CONTINUE)

(DON'T READ, BUT RECORD IF:) Not Sure.....(TERMINATE)

(DON'T READ, BUT RECORD IF:) Prefer Not To Answer.(TERMINATE)

>> IF NO CONTINUE. OTHERWISE, THANK, TERM & TALLY BELOW. OTHERWISE, CONTINUE.

1	2	3	4	5	6	7	8	9	10
---	---	---	---	---	---	---	---	---	----

ALL INCOME INFORMATION WILL BE CAPTURED, BOTH TO ASSURE RESPONDENT QUALIFICATION FOR THE SURVEY AND TO PROVIDE TAS WITH THE REPORTING DATA THAT IS REQUIRED BY OMB AT THE END OF THE PROJECT.

TABLE TO BE USED FOR Q57 - USE ANSWER FROM Q55 TO DETERMINE NUMBER IN HOUSEHOLD AND ANSWER FROM Q56 TO DETERMINE HOUSEHOLD INCOME.

Size of Family Unit	Income Ceiling (250% of Poverty Guidelines)		
	48 Contiguous States, Puerto Rico, and D.C.	Alaska	Hawaii
1	\$28,725	\$35,875	\$33,075
2	\$38,775	\$48,450	\$44,625
3	\$48,825	\$61,025	\$56,175
4	\$58,875	\$73,600	\$67,725
5	\$68,925	\$86,175	\$79,275
6	\$78,975	\$98,750	\$90,825
7	\$89,025	\$111,325	\$102,375
8	\$99,075	\$123,900	\$113,925
9	\$109,125	\$136,475	\$125,475
10	\$119,175	\$149,050	\$137,025
11	\$129,225	\$161,625	\$148,575
12	\$139,275	\$174,200	\$160,125
13	\$149,325	\$186,775	\$171,675
14	\$159,375	\$199,350	\$183,225
15	\$169,425	\$211,925	\$194,775
16	\$179,475	\$224,500	\$206,325
17	\$189,525	\$237,075	\$217,875
18	\$199,575	\$249,650	\$229,425
19	\$209,625	\$262,225	\$240,975
For each additional person, add	\$10,050	\$12,575	\$11,550

**TAS's LITC User Survey**  
**MAIN QUESTIONNAIRE**

**Q1. Who prepared your last Federal Income tax return? Did you...**(READ CHOICES AS SHOWN BELOW AND RECORD ONE ANSWER.)

- Complete It Yourself Using Tax Software.....1 ...00
- Complete It Yourself Without Using Tax Software.....2
- Pay A Tax Preparer To Complete It.....3
- Have A Friend Or Family Member Complete It.....4
- Have A Volunteer Or Clinic Complete It.....5
- Other (SPECIFY).....6
- (DON'T READ, BUT RECORD IF:) Prefer Not To Answer.....7

**IF "PAY TAX PREPARER TO COMPLETE IT" TO Q1 - ASK Q2 NEXT. OTHERWISE SKIP TO Q3.**

**Q2. Did your Preparer sign or give you a copy of your Federal Income tax return?** (READ CHOICES AS SHOWN BELOW AND RECORD ONE ANSWER.)

- Preparer Signed It.....1 ...00
- Preparer Gave Me A Copy.....2
- Preparer Signed It AND Gave Me A Copy.....3
- (DON'T READ, BUT RECORD IF:) Don't Know.....4
- (DON'T READ, BUT RECORD IF:) Prefer Not To Answer.....5

**ASK ALL:**

**Q3. Have you ever had a Tax Preparer (or representative such as an Attorney or CPA) contact the IRS on your behalf?** (RECORD ONE ANSWER.)

- Yes.....1 ...00
- No.....2
- (DON'T READ, BUT RECORD IF:) Don't Know.....3
- (DON'T READ, BUT RECORD IF:) Prefer Not To Answer.....4

**(READ) The next few questions are about possible problems that you may be facing related to filing or payment of your Federal taxes. Your personal responses will remain anonymous and will not be shared with anyone, including the IRS. Your answers will be analyzed ONLY in combination with those of hundreds of other respondents.**

**Q4. Have you received a letter or notice from the IRS, within the last three years?** (RECORD ONE ANSWER.)

- Yes.....1 ...00
- No.....2
- (DON'T READ, BUT RECORD IF:) Don't Know.....3
- (DON'T READ, BUT RECORD IF:) Prefer Not To Answer.....4

**Q5. Which, if any, of the following action(s) did you take first when you received your most recent letter/notice from the IRS? (ROTATE AND READ BOXED ANSWER CHOICES AND RECORD ALL THAT APPLY.)**

- Called The IRS's Toll-Free Customer Service Line.....1 ...00
- Put The Letter/Notice Aside Or Ignored It.....2
- Called The Phone Number On The Letter/Notice.....3
- Contacted My Tax Preparer.....4
- Contacted A Tax Professional Other Than The Tax Return Preparer 5
- Replied To The IRS Using The Address In The Letter/Notice.....6
- Contacted A Family Member/Friend.....7
- Contacted A Tax Clinic.....8
- Visited An IRS Office.....9
- Went To The IRS Website.....0
- (READ LAST:) Or Did You Take Some Other Action (SPECIFY)..... 1 ...00
- (DON'T READ, BUT RECORD IF:) Prefer Not To Answer.....2

**Q6. Have you ever had a problem with the IRS related to filing or payment of taxes? (RECORD ANSWER.)**

- Yes..... 1 ...00
- No.....2
- (DON'T READ, BUT RECORD IF:) Don't Know.....3
- (DON'T READ, BUT RECORD IF:) Prefer Not To Answer.....4

**IF "YES" TO Q6 - ASK Q7-Q9 NEXT. OTHERWISE SKIP TO Q10.**

**Q7. About how long ago did the most recent problem you had with the IRS related to filing or payment of taxes occur? Was it... (READ CHOICES AND RECORD ONE ANSWER.)**

- Within The Past Year..... 1 ...00
- 1 To 2 Years Ago.....2
- More Than 2 Years Ago.....3
- (DON'T READ, BUT RECORD IF:) Not Sure.....4
- (DON'T READ, BUT RECORD IF:) Prefer Not To Answer.....5

**Q8. Which of the following best describes the type of tax problem that you had? (ROTATE AND READ BOXED ANSWER CHOICES AND RECORD ALL THAT APPLY.)**

- IRS Said You Owe Money..... 1 ...00
- IRS Said You Have Not Filed All Of Your Tax Returns.....2
- IRS Audited Your Tax Return.....3
- IRS Filed A Lien On Your Belongings Or In Your Name.....4
- IRS Filed A Levy On Your Earnings Or Account.....5
- Your Employer Did Not Withhold Taxes.....6
- You Did Not Receive Your Expected Refund.....7
- (READ LAST:) Some Other Type Of Problem (SPECIFY)..... 8
- (DON'T READ, BUT RECORD IF:) Not Sure.....9
- (DON'T READ, BUT RECORD IF:) Prefer Not To Answer.....0

**Q9. How long did it take to resolve this problem? Did it take...(READ CHOICES AS SHOWN BELOW & RECORD ONE ANSWER.)**

- Less Than One Month.....1 ...00
- 1 To 3 Months .....2
- 4 To 6 Months.....3
- 7 To 11 Months .....4
- 1 To 2 Years.....5
- More Than 2 Years.....6
- Still Needs To Be Resolved .....7
- (DON'T READ, BUT RECORD IF:) Don't Know.....8
- (DON'T READ, BUT RECORD IF:) Prefer Not To Answer.....9

**ASK ALL:**

**Q10. Are you aware that there is a specific organization outside of the IRS that has locations throughout the U.S. and helps Taxpayers with IRS problems? (RECORD ONE ANSWER BELOW.)**

- Yes.....1 ...00
- No.....2
- (DON'T READ, BUT RECORD IF:) Not Sure.....3
- (DON'T READ, BUT RECORD IF:) Prefer Not To Answer.....4

**IF "YES" TO Q10 - ASK Q11-Q12 NEXT. OTHERWISE SKIP TO Q13.**

**Q11. Do you know the name of this organization in your area? (ROTATE AND READ BOXED ANSWER CHOICES & RECORD ALL THAT APPLY.)**

- Legal Services.....1 ...00
- Low Income Taxpayer Clinic.....2
- Tax Resource Center.....3
- Legal Aid.....4
- (READ LAST:) Other (SPECIFY).....5
- (DON'T READ, BUT RECORD IF:) Not Sure.....6
- (DON'T READ, BUT RECORD IF:) Prefer Not To Answer.....7

**Q12. How did you hear about these services? (ROTATE AND READ BOXED ANSWER CHOICES & RECORD ALL THAT APPLY.)**

- IRS Office.....1 ...00
- Friends Told Me.....2
- IRS Written Materials.....3
- IRS Website.....4
- Newspaper Article.....5
- Radio .....6
- TV.....7
- (READ NEXT TO LAST:) Other (SPECIFY).....8
- (READ LAST:) Or Have You NOT Heard Of These Services...9
- (DON'T READ, BUT RECORD IF:) Not Sure.....0
- (DON'T READ, BUT RECORD IF:) Prefer Not To Answer.....1

**ASK ALL:**

**(READ)** The Low Income Taxpayer Clinics were established to make sure every taxpayer is treated equally and fairly. They offer free or low cost assistance for eligible individuals (250% of federal poverty level based on household size) to help resolve tax problems that have not been resolved. For example, they can help you resolve audit and collection issues and can represent you if you bring your case to tax court. Assistance in other languages is available in some locations.

**Q13. When did you last contact a Low Income Taxpayer Clinic? Was it...**(READ CHOICES AS SHOWN BELOW & RECORD ANSWER.)

- Within The Last 6 Months.....1 ...00
- 6 - 12 Months Ago.....2
- More Than A Year Ago.....3
- Or Have You Never Contacted A Low Income Taxpayer Clinic.....4
- (DON'T READ, BUT RECORD IF:) Prefer Not To Answer.....5

**Q14. Based on the description that I read to you about the Low Income Taxpayer Clinic, how likely would you be to use it if you needed help? Would you be...**(READ CHOICES AS BELOW & RECORD ONE ANSWER.)

- Very Likely.....1 ...00
- Somewhat Likely.....2
- Neither Likely Nor Unlikely.....3
- Not Very Likely.....4
- Or, Not At All Likely To Use It.....5
- (DON'T READ, BUT RECORD IF:) Prefer Not To Answer.....6

**Q15. Which, if any, of the following services would you consider using at a Low Income Taxpayer Clinic?** (ROTATE AND READ BOXED ANSWER CHOICES & RECORD ALL THAT APPLY.)

- Representation In Court.....1 ...00
- Help Responding To IRS Collection Issue.....2
- Help With An IRS Audit.....3
- Assistance With An IRS Notice.....4
- Help With IRS Appeals Case.....5
- Help Correcting IRS Account Issues.....6
- Learning About Your Tax Responsibilities In A Language Other Than English.....7
- (READ LAST:) Some Other Service (SPECIFY).....8
- (DON'T READ, BUT RECORD IF:) Prefer Not To Answer.....9

**Q16. In which, if any, of the following ways do you think the Low Income Taxpayer Clinics should advertise their services to Taxpayers?** (ROTATE AND READ BOXED ANSWER CHOICES & RECORD ALL THAT APPLY.)

- On TV.....1 ...00
- On The Radio.....2
- On Posters In IRS Offices.....3
- On The Notice From The IRS Informing You That You Have A Problem.....4
- In The Tax Booklet.....5
- On The IRS Website.....6
- On A Poster In Public Buildings Such As The Post Office And Senior Citizen Centers.....7
- Tax Preparers Should Just Tell Taxpayers About The Low Income Tax Clinics.....8
- (READ NEXT TO LAST:) They Should Advertise In Some Other Way (SPECIFY).....9
- (READ LAST:) They Should Not Advertise At All.....1 ...00
- (DON'T READ, BUT RECORD IF:) Prefer Not To Answer.....2



Q17. Which of the following times best describes how far you would be willing to travel to get help at one of these free or low cost clinic locations? (READ CHOICES AS BELOW AND RECORD ONE ANSWER.)

- 15 Minutes Or Less..... 1 ...00
- 16 To 30 Minutes..... 2
- 31 To 45 Minutes..... 3
- 46 To 60 Minutes..... 4
- More Than 60 Minutes..... 5
- Not Willing To Travel At All..... 6
- (DON'T READ, BUT RECORD IF:) Prefer Not To Answer..... 9

(READ) Video Conferencing allows people to communicate over the Internet, interacting with people in other locations. By using two-way interactive audio and video communication, video conferencing allows individuals to discuss issues 'face to face' using technology, rather than traveling to a clinic. Video communication gives a similar sense of connection and collaboration as an in-person contact.

Q18. Do you have a computer with an Internet connection at home? (RECORD ONE ANSWER BELOW.)

- Yes..... 1 ...00
- No..... 2
- (DON'T READ, BUT RECORD IF:) Not Sure..... 3
- (DON'T READ, BUT RECORD IF:) Prefer Not To Answer..... 4

IF "YES" TO Q18 - ASK Q19 NEXT. OTHERWISE SKIP TO Q20.

Q19. Does your computer have video conferencing capability (that is, does it have a webcam and you have/or can load software such as Skype or ooVoo)? (RECORD ONE ANSWER BELOW.)

- Yes..... 1 ...00
- No..... 2
- (DON'T READ, BUT RECORD IF:) Not Sure..... 3
- (DON'T READ, BUT RECORD IF:) Prefer Not To Answer..... 4

ASK ALL:

Q20. In which of the following situations would you feel comfortable discussing your income tax situation with your assigned representative? (ROTATE AND READ BOXED ANSWER CHOICES AND RECORD ALL THAT APPLY.)

- In Clinic Office ..... 1 ...00
- From Home..... 2
- From Work..... 3
- By Video From A Designated Location..... 4
- Face-To-Face At A Community Services Center..... 5
- (READ LAST:) Some Other Place Or Method (SPECIFY)..... 6

**Q21. Which, if any, of the following methods best describes how you would prefer to interact with the Low Income Taxpayer Clinic?** (ROTATE AND READ BOXED ANSWER CHOICES & RECORD ALL THAT APPLY.)

- In Person..... 1 ...00
- By Telephone..... 2
- In Writing..... 3
- By Email..... 4
- By Computer..... 5
- By Video Conference..... 6
- (READ LAST:) Some Other Way (SPECIFY)..... 7
- (DON'T READ, BUT RECORD IF:) Not Sure..... 8
- (DON'T READ, BUT RECORD IF:) Prefer Not To Answer..... 9

**Q22. Which of the following best describes how you received your last Federal income tax refund?** (ROTATE AND READ BOXED ANSWER CHOICES AND RECORD ONE ANSWER.)

- Paper Check..... 1 ...00
- Direct Deposit..... 2
- Debit Card..... 3
- Refund Anticipation Check From Someone Other Than IRS..... 4
- (READ NEXT TO LAST:) Received It Some Other Way (SPECIFY)..... 5
- (READ LAST:) Or Did You Not Get A Refund?..... 6
- (DON'T READ, BUT RECORD IF:) Not Sure..... 7
- (DON'T READ, BUT RECORD IF:) Prefer Not To Answer..... 8

**IF "DID NOT GET A REFUND" TO Q22, SKIP TO Q24. OTHERWISE CONTINUE WITH Q23:**

**Q23. Did someone else take all or part of your tax refund?** (ROTATE AND READ BOXED ANSWER CHOICES & RECORD ONLY ONE ANSWER.)

- My Preparer Took Part Or All Of My Refund To Cover The Cost Of Return Preparation..... 1 ...00
- My Preparer Took Some/All Of My Refund Without My Approval..... 2
- IRS Erroneously Deposited My Refund In Someone Else's Account..... 3
- IRS Took Part Or All Of My Refund To Pay Other IRS Or State Tax Liabilities..... 4
- IRS Took Part Or All Of My Refund To Pay Child Support, Student Loan,  
Social Security Overpayments Or Other Federal Debts..... 5
- (READ NEXT TO LAST:) Did Someone Else Take All Or Part Of Your Tax Refund (SPECIFY)..... 6
- (READ LAST:) Or Did No One Take Your Tax Refund..... 7
- (DON'T READ, BUT RECORD IF:) Not Sure ..... 8
- (DON'T READ, BUT RECORD IF:) Prefer Not To Answer..... 9

**ASK ALL:**

**Q24. Do you have a personal bank account?** (RECORD ONE ANSWER BELOW.)

- Yes..... 1 ...00
- No..... 2
- (DON'T READ, BUT RECORD IF:) Not Sure..... 3
- (DON'T READ, BUT RECORD IF:) Prefer Not To Answer..... 4

Q25. **ASK ALL:** If you had to speak to someone about your tax situation, what language would you prefer to speak in? (ROTATE AND READ BOXED ANSWER CHOICES AND RECORD ONLY ONE ANSWER BELOW.)

- English..... 1 ...00
- Spanish..... 2
- Chinese..... 3
- Vietnamese..... 4
- Korean..... 5
- French..... 6
- German..... 7
- Russian..... 8
- (READ LAST:) Or Some Other Language (SPECIFY)..... 9

Q26. Which of the following best describes the level of education that you have completed? (READ CHOICES AS BELOW AND RECORD ONE ANSWER.)

- Elementary School..... 1 ...00
- Some High School..... 2
- High School Graduate..... 3
- Technical, Trade Or Business School..... 4
- Some College..... 5
- College Graduate..... 6
- Post-Graduate Work..... 7
- (DON'T READ, BUT RECORD IF:) Prefer Not To Answer..... 8

Q27. Finally, do you have any of the following long-term disability conditions, that is, conditions which have lasted 6 months or more? (ROTATE AND READ BOXED ANSWER CHOICES & RECORD ALL THAT APPLY.)

- Blindness..... 1 ...00
- Deafness..... 2
- Severe Vision Impairment..... 3
- Severe Hearing Impairment..... 4
- Severe Speech Impairment..... 5
- A Condition That Substantially Limits Your Physical Abilities Such As Standing Or Walking... 6
- A Condition That Limits Learning Or Remembering..... 7
- (READ LAST:) Or Do You Not Have Any Long-Term Disability Condition?..... 8
- (DON'T READ, BUT RECORD IF:) Prefer Not To Answer..... 9

**CLOSING COMMENTS:**

That completes the survey. Thank you for your time and help. We are required by law to provide you the OMB (Office Of Management and Budget) Control Number for this public information request. That number is 1545-1432. 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...) Internal Revenue Service, Tax Products Coordinating Committee, SE:W:CAR:MP:T:T:SP, 1111 Constitution Ave. NW, Washington, DC 20224. **INTERVIEWER: AFTER COMPLETING INTERVIEW, CROSS-CHECK COMPLETENESS.**