

Study purpose

To understand what internal and external factors are instrumental in determining why a certain number of taxpayers remain dedicated to obtaining paper products from Taxpayer Assistance Centers

Introduction (TBD)

First let's start by talking about filing taxes in general.

Tell me about the process you go through each year to file your taxes?

- PROBE: What do you like/dislike about the process? Do you file business taxes in addition to individual income taxes?
- PROBE: If so, what is the difference, if any, in your filing process (online/paper/accountant/service)?

Let's talk about different methods of filing taxes.

- PROBE: Are you aware that there is an option to file your taxes yourself using an online program?
 - If yes: what are your thoughts about this method?
- Are you aware that there is an option to complete your taxes yourself using tax software on your computer (not online)?
 - If yes: what are your thoughts about this method?
- What are your thoughts about using an online/desk top computer program versus filing your taxes using paper forms?
 - What do you see as the benefits of using a computer or online program? Drawbacks?
 - How would you compare online tax preparation programs to computer programs?
 - PROBE: e-file vs. printing completed forms and mailing
 - What do you see as the benefits of using paper forms? Drawbacks?
- What are your thoughts about filing taxes yourself versus going to an accountant or service?
- What do you see as the benefits of filing taxes yourself? Using an accountant or service? Drawbacks?

You are participating in this interview because you visited a Tax Assistance Center or TAC within the last year, and participated in a survey about your experience. Do you recall why you went to the TAC?

- If participant went for a form – what form?
 - Did you obtain the form you were looking for? Why/Why not?
 - Did you ask for help obtaining the form? Why/why not?
 - If unable to obtain form from TAC – Were you able to obtain the form at a later time after your visit? If so, how?
- If other, please explain
 - Did you speak to an agent at the TAC?
- Are you planning to visit a TAC to obtain this form/service next year? Why/Why not?

Awareness of Alternate Form Access

- Other than going to the TAC, what other methods are you aware of to obtain IRS forms?
 - If phone is mentioned - did you use the phone to try to obtain the form you were looking for?
 - Benefits and barriers; comparison to TAC
 - If telephone is not mentioned: Are you aware that IRS forms can be ordered over the phone?
 - If internet download is mentioned – did you use that method to try to obtain the form you were looking for?



- What challenges did you encounter trying to access it using this method?
- If internet downloads is not mentioned: Are you aware that IRS forms are available online for download?
 - If yes: What were the specific reasons you chose not to use this method to obtain the forms you needed?

Now let's talk about the internet in general.

- How much, if at all, do you access the internet? (If not at all, probe why? Conclude interview)
 - How do you typically access the internet (computer/mobile/tablet)
 - Where do you typically access the internet? (home/work/library)
 - On a scale of 1 to 10, how comfortable would you say you are using the internet?
 - Probe frequency of access the internet? (hourly, daily, weekly, monthly)
 - What tasks do you complete on the internet (e.g., e-mail, financial, search, access to on-line publications).
 - What makes you feel comfortable conducting these activities online?
 - What is your perception of the safety and security of the internet in general?
 - Are there any tasks you specifically do not do online?
 - What would it take for you to feel more comfortable doing these activities online?

Conclusion

Thank you for taking the time to speak to me today and provide your insights. Are there any other comments you would like to provide at this time?

We appreciate your participation in this interview, and would like to show our appreciation by providing you with a \$40 honorarium. May I confirm the address to which you would like us to send your check?

Paperwork Reduction Act Notice

The Paperwork Reduction Act requires that the IRS provide an OMB control number relating to all public information requests along with the address where you can send comments regarding the survey. The OMB number for this survey is 1545-1349. If you have any comments regarding this survey, please write to: IRS, Special Services Section, SE:W:CAR:MP:T:M:S, Room 6129, 1111 Constitution Avenue, NW, Washington, DC 20224.

Hello, my name is _____, and I am calling from EurekaFacts, a research company in Maryland. We are calling on behalf of the Internal Revenue Service to ask for your participation in a research interview to understand taxpayer opinions regarding printed tax forms. Your participation means that you will meet with an interviewer for about an hour. We are offering \$40 to thank you for your time. This feedback session will maintain privacy to the extent allowed by law, which means nothing that you say will be repeated outside of the research interview. No advanced preparation is needed for this session.

Are you interested in participating?

IF NO: Thank you and have a great day/evening.

IF YES: Great! First, I need to ask you a few questions to find out if your background meets the needs of this study.

Q1. DO NOT READ: Record Gender

- a. MALE
- b. FEMALE

INTERVIEWER: recruit a mix on gender to the extent possible

Q2. Which of the following age category are you in?

- a. **Under 18 [Terminate and thank: Based on the requirements of the study, it looks like we can't include you at this time. It is possible we will be calling you in the future for other studies.]**
- b. 18-24
- c. 25-29
- d. 30-39
- e. 40-44
- d. 45-49
- e. 50-59
- d. 60 or older

INTERVIEWER: recruit a mix of ages to the extent possible

- Q3. Have you gone to a Tax Assistance Center (TAC) within the last 12 months to obtain a paper tax form or printed information?
- a. Yes
- b. No [Terminate **and thank**]

Q4. What form or printed information did you come into the TAC to obtain?

Record answer:

Q5. What is the highest level of school you have completed?

- a. 11th grade or less
- b. 12 years of school, no diploma
- c. GED or high school graduate (diploma)
- d. some college or technical school
- e. college or technical school graduate
- f. post-graduate

INTERVIEWER: recruit a mix of respondents with different educational levels to the extent possible

As I mentioned previously, we are interviewing people over the phone to help us evaluate opinions regarding the use of paper forms. You will be mailed \$40 upon completion of the interview.

Would you still like to participate?

If YES: Thank you for your cooperation. Now, I need to set up a time for you to speak with us. I'll also need your address and phone number to send you a confirmation letter with the date and time of your interview.

[If R seems uncomfortable, explain, "This information will be used only to contact you about the interview."]

Respondent's name: _____

Address: _____

Email Address (if preferred contact): _____
(will be used to send out reminder notices)

Telephone Number: _____

Alternate Number: _____

DATE and TIME for interview: _____

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Interview Confirmation Letter



Dear [Insert NAME],

Thank you for agreeing to participate in the research interview regarding your opinions on printed products. This letter confirms that you are scheduled to participate in the interview scheduled for **DATE/TIME**.

The research interview will last approximately an hour, and you will be compensated \$40 for your time.

The interview will be held over the telephone. A EurekaFacts researcher will contact you on (date) at (time) and at the following number, which you provided earlier:"

Telephone Number: XXX-XXX-XXXX

If this number is not correct, or you would like us to contact you at a different number, please don't hesitate to call us at (866) 693-2287 ext. 261 or contact us by email at research@eurekafacts.com.

Please confirm your participation. Thank you and we look forward to speaking with you!

Best regards,

Alison Wurzel
EurekaFacts, LLC