

## **Mediabarn Unmoderated User Test IRS Recruitment Screener**

**Location:** all sessions will be conducted remotely

**Scheduled Dates:** July 2020

**Session Length:** 15 minutes

**Number of participants:** 30 participants

**Incentives (Amazon.com gift cards):**

- Advanced booking: \$50

## Phone SCRIPT

Hello, may I please speak to (name)? This is (name) from **Mediabarn** in Arlington, VA. I am calling you today because you responded to an ad we posted about a user research study. Is this a good time to speak with you?

Again, I am calling about the ad we posted to participate in an online survey. Have you ever taken an online survey before?

### **IF THEY ASK HOW THIS ONLINE SURVEY WORKS:**

*For this online survey, you will spend about 15 minutes evaluating a couple of documents and talking about and answering questions regarding your understanding of the documents and the actions you might take after reading the documents. You will need to participate from a location where you have a computer with reliable high-speed Internet access, computer speakers, and a microphone. You should be comfortable and uninterrupted for the length of the session.*

We are running our study in mid-June and are offering a \$50 **Amazon.com gift card** to those who participate. If you qualify, are you available to participate? You will need to complete your online survey session **no later than midnight on Friday, July 17<sup>th</sup>**.

### Paperwork Reduction Act

OMB No: 1545-2256. This report is authorized under the Paperwork Reduction Act. Data collected will be shared with IRS staff, but your responses will be used for research and aggregate reporting purposes only and will not be used for other non-statistical or non-research purposes such as direct enforcement activities. The information that you provide will fully be protected allowable under the Freedom of Information Act (FOIA). Public reporting burden for this collection of information is estimated to average 15 minutes, including the time for reviewing instructions, searching existing data sources, gathering and maintaining the data needed, and completing and reviewing the collection of information. Send comments regarding this burden estimate or any other aspect of this collection of information, including suggestions for reducing this burden, to Special Services Section, SE:W:CAR:MP:T:M:S, Room 6129, 1111 Constitution Avenue, NW, Washington, DC 20224.

### **IF AVAILABLE**

Great! I'll need to ask you a several follow-up questions to assess whether you will qualify for this specific study. All the information you provide will be kept confidential at Mediabarn.

**(Continue to IRS-specific recruitment questions.)**

### **IF NOT AVAILABLE**

May we call you for a future testing opportunity?  
YES/NO  
Thank you very much for your time. Good bye.

## IRS-Specific Recruitment Questions SCRIPT

1. Sometimes we need to speak with those who have and those who have not been part of a market research study in the past. When, if ever, was the last time you participated in a market research study? \_\_\_\_\_

**THANK AND TERMINATE IF LESS THAN SIX MONTHS AGO.**

If over six months ago: What was the topic of that study? \_\_\_\_\_

2. These research study sessions will be audio and/or video recorded for internal use only. Therefore, we will ask that you agree to be recorded; would you be agreeable to that?

- Yes  
 No **(Terminate call – Skip to bottom of script.)**

3. I'd like to read you a series of statements; please let me know if any of these apply to you.

1. In the past 3 years, you have not owed a balance on your tax return. – **Terminate**  
 2. In the past 3 years, you have received a tax refund for each year. – **Terminate**  
 3. In the past 3 years, you have received a notice related to an unresolved balance with the IRS. – **REQUIRED**  
 4. In the past 3 years, you have made an electronic payment through the IRS website.  
 5. In the past 3 years, you have created a payment plan with the IRS to pay off an outstanding tax balance. – **REQUIRED FOR HALF OF SAMPLE; CONTINUE WITH Q4**  
 6. In the past 3 years, you have made estimated tax payments to the IRS.  
 7. None of the above apply to me.

**FOR THOSE WHO HAVE NOT CREATED A PAYMENT PLAN – SKIP TO Q5**

4. What type of payment plan did you create with the IRS?

- Short-Term Plan (Extension) – **RECRUIT 1/3**  
 Long-Term Monthly Payment Plan (Installment Agreement) – answer the following:

How do you make the monthly payments toward your long-term payment plan?

- Sent a check for almost every monthly payment.  
 Manually entered my debit/credit card or banking information online for almost every monthly payment online, either via mobile device or computer. **– RECRUIT 1/3**  
 Entered and saved my debit/credit card information to charge the payments automatically for almost every monthly payment. – **RECRUIT 1/3**

5. How would you rate your level of computer proficiency?

- 1 (zero expertise) **(DO NOT SCHEDULE FOR SESSION)**  
 2 **(DO NOT SCHEDULE FOR SESSION)**  
 3  
 4  
 5 (expert)

6. Are you familiar with using any of the following software? (check all that apply)

- WebEx
- Go to Meeting
- Zoom
- Skype
- Other / Similar
- None

**(DO NOT SCHEDULE FOR SESSION)**

**IF ELIGIBLE → Invite to Participate**

Thank you for answering all of my questions. As a continuation of our research, we would like to invite you to participate in our online survey. I will send you the link to the survey via your email. The survey will take about 15 minutes to complete and you will be paid a \$50 **Amazon.com gift card** for your time.

You may complete the survey at your convenience once you receive the link, but you must complete it no later than midnight Eastern Daylight Time on Friday, July 17, 2020 in order to receive your gift card.

We are using an online platform called Loop11. So that the software can record your session, it may prompt you to download an extension the first time you use the program. Since you will be working remotely, a Mediabarn technical advisor will contact you to conduct a technology check to assist you with navigating the instructions and to troubleshoot any technical difficulties.

Do you have any questions for me at this time?

Thank you for your willingness to participate in this study. Good-bye.

**IF NOT ELIGIBLE → Discontinue call**

I am sorry we are looking for people who fit a specific circumstance and it doesn't appear that we will be able to use you for this test. May we call you for a future testing opportunity? YES/NO

Thank you very much for your time. Good-bye.