

IRS W-4 Usability Testing

Task 7 Screener and Phone Guide

Intro

Thank you for your call, this is [NAME] with the MITRE Corporation.

i. Did you receive a letter about the new W-4 form study that we are doing for the IRS?

Yes **[Record in Spreadsheet]**

No **[If no, determine how participant learned of study/why calling]**

ii. How did you learn about this study?

[If answer to question i is no]:

We appreciate your interest in our independent study. We are trying to understand a very specific group of taxpayers and sent letters to members of that group. If you did not receive a letter, you are not eligible to participate. Thank you for calling. Have a nice [day/evening].

[If answer to question i is yes]:

We are conducting an independent research study for the IRS to gather feedback from W-2 wage earners and taxpayers like you, and we are traveling to your area to conduct this research. We are looking for eligible volunteers to participate in this study. Eligible volunteers will participate in a 60 to 90-minute in-person interview at a public location near you. If eligible, you will receive a \$100 Visa gift card as a token of appreciation for your participation. We will not ask you for your Tax ID number or Social Security Number during this call or during the in-person interview.

Do you have about five minutes to answer some questions, so we can verify your eligibility to participate in the study? If eligible, we will go ahead and schedule an in-person interview.

Screener

1. What is your full name?

[Record in Spreadsheet]

2. What is the best contact phone number for you?

[Record in Spreadsheet]

3. Do you have an e-mail address that you would like to use for any future correspondence about the study?

[Record in Spreadsheet]

3. What is the zip code of your primary residence? **[Record zip code on spreadsheet]**

Within set zip code limits of 4 travel locations **[WILL LIST ELIGIBLE ZIP CODES IN FINAL TRACKING SPREADSHEET]**

Outside of set zip code/city limits – **Terminate:** I'm sorry, we are only conducting interviews within a certain set of zip codes, so you don't qualify for this study. Thank you for your time. Have a good [day/evening].

4. We will be conducting sessions at your location between [date] and [date]. We are looking for participants to meet us at [LOCATION] for a 60 to 90-minute interview and exercise to obtain feedback on the new W4. Are you available to meet us at [specific location] during this time frame?

Yes - Continue

No - **Terminate:** Thank you for your time. Have a good [day/evening].

5. Did you receive a Form W-2 (Wage and Tax Statement) in the last 4 years?

Yes - Continue to next question

No - **Terminate:** I'm sorry, we are only looking for people who earned W-2 wages in the last 4 years. Thank you for your time. Have a good [day/evening].

6. Have you ever completed a W-4 form for an employer?

Yes - Continue to next question

No - **Terminate:** I'm sorry, we are only looking for people who have completed a W-4 form

7. When did you last complete a W-4 form?

Continue to next question, regardless of answer

8. What was your filing status for your most recent tax return?

Single

Married Filing Joint

Married Filing Separate

Head of Household

Widow/Widower

9. What is your age?

under 18- **Terminate:** Thank you for your time. Have a good [day/evening].

18-30

31-55

56-68

69-81

82+

10. How many W-2s did you receive in the last year you filed? (If married) How many W-2s did your spouse receive in the last year you filed?

11. We'd like to ask about the range of your household income. [Record answer in spreadsheet]

Is your household's annual income less than \$15,000 a year?

Yes

No

Is your household's annual income between \$16,000 and \$35,000?

Yes

No

Is your household's annual income between \$36,000 and \$50,000?

Yes

No

Is your household's annual income between \$51,000 and \$75,000?

Yes

No

Is your household's annual income between \$76,000 and \$90,000?

Yes

No

Is your household's annual income more than \$91,000 a year?

Yes

No

12. What is the highest degree or level of school you have completed?

No schooling completed

Completed schooling through Grade ____ .

Received High School Diploma, GED or alternative credential for high school graduation

Associate's Degree

Bachelor's Degree

Master's Degree (for example: MA, MS, Meng, MEd, MSW, MBA)

Professional degree beyond a bachelor's degree (for example: MD, DDS, DVM, LLB, JD)

Doctorate degree (for example: PhD, EdD)

Thank you for taking time to answer these questions. Please hold for a moment while I verify your eligibility.

Thank you for waiting. You are eligible to take part in our study. Participation requires that you attend an in-person interview at a public location where MITRE researchers are conducting the interviews. At the in-person interview, you will receive a \$100 VISA prepaid gift card as a thank you for participating in this important study. Of the following time slots, which works best for you? **[Read list of available time slots from tracking spreadsheet, record in spreadsheet and confirm follow up contact information].** We will contact you again before the interview to confirm your participation. Have a great day!