

CEEN 94X Interviews: Participant Screener

Introduction

Hello, my name is _____ and I am calling on behalf of XXXXXXXXXXXX. We are conducting a paid study to gather feedback on the experience that an individual has when interacting with the IRS about employment tax issues.

The study will consist of one-on-one interviews on _____ and _____. The interview will last about 60 minutes, and we are offering both day and evening sessions for your convenience. If you are eligible and decide to participate, you will receive a \$75 honorarium. The interview will be strictly for research, and all of your comments will be held private to the extent covered by law. Would you be interested in participating?

Yes – Continue

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

[If YES above] I'd now like to ask a few questions to see if you meet the criteria that we are looking for.

We are required by law to report to you the OMB (Office of Management and Budget) Control Number for this public information request. That number is 1545-1349. In addition, if you have any comments about the time estimate associated with this study or suggestions on making this process simpler, you may write to the IRS. Would you like the address?

[If yes]

Internal Revenue Service, Tax Products Coordinating Committee, SE:W:CAR:MP:T:T:SP, 1111 Constitution Ave. NW, Washington, DC 20224.

Screening Questions

1. Have you filed, or do you plan to file a federal individual income tax return this calendar year? (for taxes paid in 2019)

Yes – Continue

No- Did not meet income requirement

No- Know I will owe and can't afford it currently

No- Other reason _____

****All responses continue****

2. Have you filed employment tax forms such as IRS Form 940, 941, or 944 within the last year?

Yes – Continue

No – Terminate

TERMINATE TEXT

Thank you very much for your time and thank you for answering our questions. Unfortunately, based on the requirements, we are not able to extend you an invitation. Perhaps we can include you in a future research session. Have a good [day/evening].

3. Do you have an active Employer Identification Number (EIN) with the IRS?
 Yes – Continue
 No – Terminate
 Unsure, please explain _____ – Terminate

TERMINATE TEXT

Thank you very much for your time and thank you for answering our questions. Unfortunately, based on the requirements, we are not able to extend you an invitation. Perhaps we can include you in a future research session. Have a good [day/evening].

4. Have you submitted paper IRS Forms 940, 941, or 944 via mail within the last year?
 Yes
 No
****All responses continue****

5. Have you made at least one payment using the Electronic Federal Tax Payment System (EFTPS)?
 Yes
 No
 Unsure, and why _____
****All responses continue****

6. Do you use a tax preparer, accountant, payroll service, reporting agent, or other third-party to file and business taxes for you?
 Yes
 No
****All responses continue****

4. Do you own a State-legal cannabis business?
 Yes
 No
****All responses continue****

Demographics

7. To which age group do you belong? (Read list)
 under 18- Terminate: Thank you for your time. Have a good [day/evening].
 18-25
 26-34
 35-50

- 51-65
- 66-74
- 75+

8. What is the total annual income of your business? (Read list)
- Less than \$10,000.....Continue
 - \$10,000 but less than \$250,000.....
- Continue
- \$250,000 but less than \$1,000,000.....Continue
 - \$1,000,000 but less than \$10,000,000.....Continue
 - \$10,000,000 or more.....Terminate

Invitation to Participate

Thank you for answering our questions. Based on your responses, you qualify for the research interviews. We would like to invite you to take part in this study. The research interviews will take place on <dates> at <location>. If you choose to participate, you will receive a \$75 honorarium at the end of the session for participating.

9. Would you like to hear what times we have available?
- Yes – Discuss time options
 - No – Terminate: Thank you for your time. Have a good [day/evening].
10. Are you free at any of those times and are you willing to participate?
- Yes – Continue
 - No – Terminate: Thank you for your time. Have a good [day/evening].

I'm glad that you will be able to join us! At this point I need to collect some contact information from you.

(Note: This information is required only as a part of this study. Your information is kept strictly private to the extent allowed by law. Your phone number is required only for a reminder call that will be made prior to the start of the research study).

- First name:
- Last name:
- Email:
- Daytime/Evening phone:

Thank you. We are only inviting a few people, so if for some reason you are unable to participate, it is very important that you notify us as soon as possible so we can find someone else to take your place. Please call or email [insert contact and phone, email] if this should happen. We look forward to having you participate on [insert appropriate date].

Thank you for your time. We will be in touch again the day before the session to confirm your attendance.