

**2019 UNDERSERVED TAXPAYER FOCUS GROUPS
Screener**

Respondent Numerical ID# _____ Zip Code _____ ...000-000

Demographics In This Underserved Study Are Not Controlled – They Should Reflect Demos Of Those Qualifying As Underserved.

For Phone Survey: Record Disposition Of Each Call On This Number.

	<u>Disconnected</u>	<u>No Answer</u>	<u>Unavailable</u>	<u>Refused</u>	<u>Not Qualified</u>	<u>Complete</u>	
Date _____ Time _____ (AM)(PM)	1	2	3	4	5	6	...000
Date _____ Time _____ (AM)(PM)	1	2	3	4	5	6	...000
Date _____ Time _____ (AM)(PM)	1	2	3	4	5	6	...000
Date _____ Time _____ (AM)(PM)	1	2	3	4	5	6	...000
Date _____ Time _____ (AM)(PM)	1	2	3	4	5	6	...000

INTRODUCTION – NOTE: ANYONE SCREENED MUST BE READ THE CLOSING PRA STATEMENT.

Hello, I’m _____ of Russell Marketing Research, an independent national survey firm. May I speak with a (ROTATE) (male) (female) who is age 18 or over, and who filed his/her Federal income taxes this year? (AFTER REACHING POTENTIAL RESPONDENT, CONTINUE WITH:) We are contacting Taxpayers in this area about participation in a 90-minute focus group research study. In this study, we will ask about 8 Taxpayers like you to come in and discuss how the IRS can better serve your needs and issues. You will NOT be asked about your personal financial information, nor will we ask for any information that would identify you personally. If you are eligible for this study, you would receive [\$incentive amount] at the end of the discussion as a way of thanking you for your help in the research. (IF RESPONDENT IS AGREEABLE, CONTINUE WITH:)

Do you or anyone else in your family work in any department or unit within the Internal Revenue Service or IRS? (IF “YES”, THANK AND TERM. IF “NO” CONTINUE WITH:) Would you be interested in participating in this focus group discussion? IF “YES”, CONTINUE. IF “NO”, THANK & RECORD AS “Ref” ON LINE FOR THIS ATTEMPT IN BOX ABOVE. IF “YES”, READ: Thank you. The focus group is intended for a defined group of Taxpayers. So first, let me ask a series of questions to determine if you are among that group. CONTINUE SCREENING.

1. (BY OBSERVATION, RECORD GENDER:) Male.....1 Female.....2 ...000
RECRUIT MIX PER GROUP.
2. What is your zip code? (ENTER HERE:) _____ ...000

3. Which of the following best describes your age? (CLICK ANSWER BELOW.)

- Under 18.....(TERM)
- 18-25 (CONTINUE WITH Q4).....1 ...000
- 26-35 (CONTINUE WITH Q4).....2
- 36-45 (CONTINUE WITH Q4).....3
- 46-55 (CONTINUE WITH Q4).....4
- 56-64 (CONTINUE WITH Q4).....5
- 65 Or Over (CONTINUE WITH Q5).....6
- REFUSED.....(TERM)

IF 18-64, CONTINUE WITH:

4. Have you ever filed Federal income taxes? Yes.....1 No (TERM).....2 ...000

IF 65 +, CONTINUE WITH:

5. And, did you or do you plan to file Federal income taxes in 2019 for the tax year 2018?
 Yes.....1 No (TERM).....2 ...000

ASK ALL:

6. Do you have access to and regularly use the Internet?
 Yes (CONTINUE WITH Q7).....1 No (THANK, TERM & TALLY).....2 ...000

- 7. **As you know, the IRS is responsible for applying Federal tax laws. I'm going to describe some situations that might result from the application of Federal tax laws. After I read each one, please tell me if you have experienced any of these situations in the past 2 years as a result of the application of Federal tax laws. (READ RANDOMIZED LIST & CLICK ANSWERS IN COL 7.)**

- 8. **Now please tell me if you are currently experiencing any of these situations as a result of the application of Federal tax laws. (READ & CLICK ANSWERS IN COL. 8.)**

COL. 7 COL. 8
 Experienced Past 2 Yrs. Currently Experiencing

Economic Harm/Financial Distress

Experiencing economic harm or is about to suffer economic harm.....	1	1		...000
Facing an immediate threat of adverse action.....	2	2		
Incurring significant costs if relief is not granted (including fees for professional representation).....	3	3		
Suffering irreparable injury or long term adverse impact if relief is not granted.....	4	4		

Tried To Resolve Problem But IRS Couldn't

Experiencing a delay of more than 30 days to solve a tax account problem.....	5	5		
Not receiving a response or resolution to an IRS problem by the date promised.....	6	6		
A system or procedure has either failed to operate as intended, or failed to resolve your problem or dispute within the IRS.....	7	7		

Violation Of Taxpayer Rights

The manner in which tax laws were administered raised considerations of equity, or impaired or will impair your rights as a Taxpayer.....	8	8		
The National Taxpayer Advocate determined that compelling public policy warranted assistance to you as an individual or a part of a group of Taxpayers.....	9	9		
None of these.....				TERM

IF ANY ANSWER CLICKED UNDER COLS. 7-8, ASK Q9. OTHERWISE, THANK, TERM & TALLY:

9. At any point in your experience with this problem, did you or anyone on your behalf, receive the assistance of a specific department within the IRS called the Taxpayer Advocate Service?

Yes (THANK, TERM & TALLY).....1 No (CONTINUE WITH Q10).....2 ...000

10. Have you ever visited the Taxpayer Advocate Service’s website?

Yes (THANK, TERM & TALLY).....1 No (CONTINUE WITH Q11).....2 ...000

11. Would you consider the area you live in to be...? (CLICK ANSWER BELOW.)

URBAN.....1 ...000

SUBURBAN.....2

RURAL.....(TERM)

RECRUIT MIX OF URBAN / SUBURBAN PER GROUP.

PARTICIPATION OFFER: We’d like you to join us in a group discussion of IRS services for Taxpayers.

You and about 7 other Taxpayers would come to our focus group facility across from MetLife Stadium near Route 3 in East Rutherford on (DATE) at (TIME) and spend about an hour and a half with us.

Your participation is voluntary, and as a thank-you for taking the time to help us, we’ll have a [\$incentive amount] check for you at the end of the group discussion.

Will you join us? IF “NO”, THANK & TERM & TALLY. IF “YES”, CONFIRM OFFER & **CLOSE:**

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 [TBD]. In addition, 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, Special Services Committee, SE:W:CAR:MP:T:M:S - Room 6129, 1111 Constitution Avenue, NW, Washington, DC 20224.*

RECRUITMENT NOTE: Recruiting two 90-minute groups. Each recruiting 11 to seat 8. Group times TBD.